

*Baton Rouge
Area Foundation*



STRATEGIC FRAMEWORK

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STRATEGIC FRAMEWORK

Executive Summary

This report represents a culmination of the key findings and recommendations generated during the Baton Rouge Area Foundation's Strategic Planning process. It is distilled from the work of our Strategic Planning Committee, each of our six Advisory Councils, and our ongoing Community Conversations with stakeholders from across South Louisiana.

The goal of this strategic planning process is to develop a robust but flexible framework that will set a clear North Star for the Foundation, while leaving us plenty of room to determine how and what we do. To generate this strategic framework, we utilized a variety of methods and modalities to engage our key internal and external stakeholders—those who currently work closely with the organization and groups and individuals with which we do not yet have a relationship.

The Strategic Planning Committee sits at the center of this process, overseeing six topically focused Advisory Councils, synthesizing data from our various workstreams into a coherent strategic framework, and recommending that strategic framework to the full Foundation Board of Directors for approval.

In developing this framework, our Strategic Planning Committee was charged with considering the following guiding questions:

- 1. What goals should BRAF pursue over the next 5-10 years?**
- 2. How will BRAF measure its impact and progress against those goals?**
- 3. What new resources, structures, and relationships are needed to meet these goals?**

Coming out of this comprehensive process, the Committee presents for consideration the following draft strategic framework.

OUR NORTH STAR:

Build a **thriving and resilient future** for all in Baton Rouge and beyond.

- 1 CATALYZE POSITIVE CHANGE AND OPPORTUNITY**
- 2 FOSTER A STRONG PHILANTHROPIC COMMUNITY**
- 3 EMPOWER CHANGEMAKERS AND NONPROFITS**
- 4 SPOTLIGHT IMPACT AND INSPIRE CIVIC PRIDE**
- 5 DELIVER OPERATIONAL EXCELLENCE**

The remainder of this report details how the Committee did its work and additional detail behind our recommendations.

Process Overview

To prepare this report, the Strategic Planning Committee and its six Advisory Councils met five times each in 2022 and reviewed prework in preparation for each session. As of the delivery of this final report, the CEO has also met with 230+ individuals across 50+ Community Conversations to solicit input and counsel from a diverse array of community stakeholders. In pursuit of their mission, the Committee and Councils utilized the following resources (see [Appendix A](#) for more detail):

- White papers and articles
- Recorded interviews and videos
- Panel discussions and interviews with industry experts, peer foundations, and community members

The Committee met on the following dates either at the Baton Rouge Area Foundation or via Zoom:

- Wednesday June 29th, 7:30am-12:00pm
- Thursday July 28th, 2:30-4:30pm
- Tuesday August 16th, 4:00-5:30pm
- Thursday September 15th, 12:00-5:00pm
- Wednesday October 5th, 2:00-4:00pm

Detailed Recommendations

PILLAR #1: CATALYZE POSITIVE CHANGE AND OPPORTUNITY

Throughout the strategic planning process, many stakeholders emphasized that BRAF is uniquely positioned to build and execute an agenda designed to purposefully expand opportunity in our community. A community where future generations feel like they belong and can thrive. A community which attracts new citizens to seek it out as their own home.

To realize this future, BRAF must focus on the key drivers of opportunity, channeling its leadership and impact in the following areas:

- Economic prosperity: Baton Rouge realizes meaningful upward mobility, becomes a magnet to attract talent to our community
- Excellent education: every child has excellent learning options from cradle to career to unlock and fulfill their potential
- Healthy families: Baton Rouge among fastest improving cities in health outcomes
- Quality of life: Baton Rouge is the best place to live and work
- Strong and safe neighborhoods: every corridor has a plan to spur investment, improve safety, and secure quality housing
- Regional resiliency: we don't wait on the next crisis to prepare and strengthen our infrastructure and community ties

While our goal is clear, before moving to identify specific projects, Advisors encouraged BRAF to develop a theory of action for how the Foundation will build solutions, engage civic leaders, and convene partners. BRAF's convening power is broadly recognized by Advisors and community stakeholders alike as a clear strength. To better enact a transformational agenda, the Foundation should consider enhancing and expanding its existing capabilities to drive systems-level change (e.g., advocacy, policy design, etc.). As we move forward, we must also define who we need to engage with (diverse partners) and how.

Advisors further counsel that the Foundation should establish clear selection criteria that ensure organizational resources align with the highest impact and best positioned projects, including:

- Why are we engaging?
- How should we engage?
- How would the system/community be changed?

Nonetheless, Advisors appreciate BRAF's flexibility and responsiveness to address new and emerging issues—especially in moments of disaster or crisis—and encourage the Foundation to retain some flexibility to respond to new opportunities and challenges and continue to dream of out-of-the-box ideas.

Additional tactical recommendations, potential challenges, and measures of success can be found in the Civic Leadership Advisory Council's Final Report ([Appendix B](#)).

PILLAR #2: FOSTER AN IMPACTFUL PHILANTHROPIC COMMUNITY

A critical part of our role as a community foundation is to inspire philanthropy across our region. All members of our community should be able to see themselves as a philanthropist—a person who seeks to promote the welfare of others by offering their time, talent, and resources. BRAF must seek to engage anyone eager to begin or further their journey as a philanthropist and support them on that mission throughout their lifetime. The Foundation should be positioned to support philanthropists of all capacities in enhancing the reach of their giving, providing outlets and education to maximize their impact.

There is perhaps no better way to first engage with the Foundation than through Membership. Membership is a compelling and straightforward way for community members to learn about the work of the Foundation and to support causes that promote good in our community. To make Membership more accessible, we must clearly define the value proposition for BRAF Membership, differentiating membership tiers and benefits for a variety of stakeholders.

Advisors also encourage BRAF to further clarify and define BRAF's comprehensive value proposition - to fund holders, donors, and members alike. BRAF will never be able to compete on price with online brokerages, but can differentiate itself based on the unique value we provide to our community. Especially for fund holders, demonstrating our compelling advantages over other outlets and differentiating that message by stakeholder (e.g., organizations versus individuals) will allow us to remain competitive.

We must also prioritize stewarding existing donors to the Foundation, to deepen and expand existing relationships. Advisors strongly emphasized that stewardship is our single most important donor strategy. It is critical that the Foundation continuously invest time and energy into authentic relationship building with those that choose to give through BRAF. We should also utilize board and current donors to build new and

deepen existing relationships. Professional Advisors were a constituency identified by Peer Community Foundations as an especially critical constituency in stewardship. Professional Advisors include CPAs, attorneys (especially in the field of estate planning), brokers, financial planners, private bankers, and other professionals in the financial services sector. PAs serve as validators in the community, connectors to potential fund holders and donors, and partners via their respective versions of “Keep Your Broker”. They also play an especially important role in planned giving and major gifts.

By investigating new tools and strategies that make philanthropy more accessible and engaging, we can potentially activate not just the Next Generation of Philanthropists but our current donors as well. Potential tools and strategies could include:

- Mission-related and program-related investments
- Affinity-based funds
- Community philanthropy
- Giving circles
- ESG investment portfolios for funds
- Improved/enhanced technology offerings (e.g., online portal, performance reports, information about giving opportunities)
- Volunteering or engagement opportunities (e.g., with BRAF sponsored or supported NPOs or organizations)

Our civic initiatives represent some of our most popular and best-known work. Consequently, we should explore creating clear and compelling ways for donors of all capacities to engage with and donate to the Foundation's civic initiative projects. Moreover, as we think about our peer foundations locally (especially corporate and private peers), we should purposefully engage them in a discussion about our strategic priorities to identify areas of alignment to amplify our shared philanthropic impact and grantmaking activity.

Additional tactical recommendations, potential challenges, and measures of success can be found in the Final Reports for the Philanthropy Advisory Council ([Appendix C](#)) and the Finance & Investment Advisory Council ([Appendix G](#)).

PILLAR #3: EMPOWER CHANGEMAKERS AND NONPROFITS

One of the most important ways in which we realize the mission of the Foundation is by working through our nonprofit partners in the community as a force multiplier. In addition to serving as a conduit for our donors, the Foundation also currently serves our nonprofit partners in important ways, including through formal programming, consulting relationships and via more informal counsel.

Moving forward, we believe there is a role for the Foundation in ensuring that the broader nonprofit ecosystem is healthy and thriving. We can achieve this by further studying the existing ecosystem and expanding our offerings to supplement what already exists in our community.

Nonprofit leaders engaged throughout the strategic planning process indicated they desire a closer relationship with the Foundation and would benefit from additional training and education opportunities to develop skillsets as well as new financial tools (e.g., access to impact funds, Mission/Program Related Investments, and/or establishing their own agency/organization fund) to support their sustainability. BRAF's existing role as a convener was identified as a valuable community asset, and we were encouraged to keep playing this role.

As BRAF contemplates these new services and programming, we will need to clearly and strategically define how nonprofits are selected for inclusion in existing and new support services, given limited time and resources on the part of the Foundation. For example, we may focus on a convening agenda that aligns with our civic leadership agenda. Further, BRAF may target its services on sustaining and advancing those change agents and organizations that are explicit partners in executing our strategic agenda in the community.

As we seek to empower changemakers and organizations that align with our priorities, BRAF should also consider establishing an accelerator that supports existing and emerging changemakers and social entrepreneurs.

Finally, we should expand our existing communications strategy to amplify the work of existing nonprofits, recruit nonprofits to engage in expanded support services as capacity to serve nonprofits expands, and tell BRAF's story of impact.

Additional tactical recommendations and potential challenges can be found in the Nonprofit Excellence Advisory Council's Final Report ([Appendix D](#)).

PILLAR #4: SPOTLIGHT IMPACT AND INSPIRE CIVIC PRIDE

The Foundation is perhaps one of the best kept secrets in Baton Rouge. While our humility has been critical in centering our impact and elevating others, our limited communications reach has hampered our ability to engage the community more broadly in our work. Nearly every Advisory Council and the members of the Strategic Planning Committee encourage the Foundation to invest significantly in telling the story of our donors, our partners, and our work in order to better enact our mission moving forward.

First and foremost, we must broadly communicate our products, services, initiatives, and projects—and the impact of each—to clarify organizational goals, establish credibility, inspire trust, and encourage public support for our initiatives and projects. In support of this strategy, the Foundation must develop multi-generational strategies that resonate across the breadth of our community to reach a broader audience. Advisors and community stakeholders all named that they were surprised by some of the Foundation's prior work or the impact of our donors. All encouraged us to share more of that story moving forward.

We will also need to invest in new communications tools and strategies. Advisors emphasized that we have the content to inspire; now we need to tell this story more regularly and through new modes. The Foundation can also serve to amplify and celebrate the successes of other organizations to further foster pride. We have much rich content to repurpose, but

it must be designed for new audiences and digital platforms. Advisors cautioned that we must embrace a “yes and” strategy, respecting traditional communications channels (e.g., print, email, calls, letters) while embracing opportunities to engage new constituents with digital and social channels. Beyond just emphasizing past wins, we must also clearly communicate our vision and what the Foundation does to support the community.

BRAF has a rich history of engaging a diverse cross-section of stakeholders across our community. This strategic process afforded the new leadership and existing team the opportunity to further deepen and broaden those relationships with existing and new stakeholders as well. Some of the newer stakeholders engaged shared that they did not previously feel like they were proactively engaged and appreciated being included in our process. Moving forward, BRAF should continue to maintain and nurture these relationships and new ones as it seeks to drive a transformational agenda, especially prioritizing community engagement, inclusion, and representation.

Finally, Advisors counseled that our partners have the potential to be our greatest communications assets. If our partners are equipped with content and support in telling our story, we can amplify our storytelling capacity manifold.

Additional tactical recommendations, potential challenges, and measures of success can be found in the Communications & Community Engagement Advisory Council’s Final Report ([Appendix E](#)).

PILLAR #5: DELIVER OPERATIONAL EXCELLENCE

Cutting across all recommendations is a discrete set of operational enablers that underpin our ability to drive impact and execute against our priorities. Below are key recommendations that will allow the Foundation to fully implement this framework:

FINANCIAL RESOURCES Growing our resource base must be a priority—especially emphasizing growth in operating income to build the team and infrastructure needed to drive our civic impact agenda. BRAF should explore additional ideas/strategies to generate revenue, including formally reviewing our current fee and pricing structure (e.g., exploring fee for service models, contribution fees, SO fee structure, membership types, etc.). We should also explore pathways to developing operating model sustainability through the creation and build out of an operating endowment.

PERSONNEL We must align our organizational and staffing structures and resources to our strategic priorities. Advisors across all Councils emphasized that our human capital is truly our most valuable. To ensure we are positioned to fully implement these recommendations, we must develop an organizational structure that is aligned to this framework and fully staff to execute current work as well as new initiatives.

TECHNOLOGY Technology has been described as an Achilles heel for the organization. Nonetheless, it represents a tremendous opportunity to enable greater scale, efficiency, and personalization in our communications, financial processing, and philanthropic services. While technology will never be a replacement for human interaction, it can help to facilitate better service, institutionalize knowledge, and enable greater scale at lower cost. Investing in stronger systems and processes related to technology and its use would enable the Foundation to accelerate its agenda.

SUPPORTING ORGANIZATIONS SOs represent more than half of BRAF’s asset base and a sizeable opportunity for aligned impact. Consequently, the Foundation should invest staff time and resources in reviewing and refining our supporting organization strategy to ensure that we fully understand the costs and benefits (monetary and non-monetary) of our current and future SOs. Specifically, the Foundation should:

- Analyze our SO fee structure, balancing the desire for mission-driven work with appropriate support for Foundation staffing and resources.
- Create an SO policy framework to guide future Supporting Organization relationships.
- Examine the effectiveness of each board-appointed committee and SO in terms of governance, impact, and information sharing.

GOVERNANCE & STRUCTURE Coming out of this strategic planning process, BRAF should update board governance processes and structures to facilitate more strategic engagement and ensure we continue employing best practices in nonprofit oversight. Furthermore, Advisors encouraged the Foundation to contemplate the creation of a “Community Foundation for Louisiana” (or equivalent) to serve as a conduit for Supporting Organization relationships beyond the greater Baton Rouge area.

CONTINUOUS IMPROVEMENT Finally, as the Foundation seeks to remain a leader in civic and philanthropic agendas, we must employ a continuous improvement mindset relentlessly focused on evaluating the effectiveness of newly implemented strategies and structures across the enterprise.

Additional tactical recommendations, potential challenges, and measures of success can be found in the Advisory Council Final Reports for Finance & Investment ([Appendix G](#)) and Governance & Supporting Organizations ([Appendix F](#)).

Final Thoughts & Considerations

Ultimately, this Committee believes that this framework and recommendations will support the Foundation as it envisions its next chapter of impact in Baton Rouge and across Louisiana. In addition to the overview provided in this report, each Advisory Council has also submitted a Final Report with more detailed learnings, tactical recommendations, potential challenges and measures of success (see Appendices B-G).

APPENDIX A

Sources of Information

- Article: [A Transformative Moment for Philanthropy](#), *McKinsey & Company*
- Article: [What’s Next in Community Philanthropy](#), *The Monitor Institute by Deloitte*
- Peer Community Foundation, Virtual Visit: Coastal Community Foundation
 - Darrin Goss, CEO
 - Paul Kohlheim, Past Board Chair
- Community Panel Discussion: Baton Rouge Leaders
 - Sharon Weston Broome, Mayor-President Baton Rouge, LA
 - William F. Tate IV, President Louisiana State University
 - Adam Knapp, CEO Baton Rouge Area Chamber
- CEO Community Conversations:
 - 150+ individuals engaged across 20+ completed conversations
 - 80+ individuals to be engaged across 30+ scheduled conversations
- Interim Reports
 - Civic Leadership
 - Philanthropy
 - Governance & Supporting Organizations
 - Nonprofit Excellence
 - Communications & Community Engagement
 - Finance & Investment
 - Community Conversations

APPENDIX B

Civic Leadership Advisory Council Recommendations

Executive Summary

The goal of the Civic Leadership Advisory Council is to explore what opportunity means in Baton Rouge and what impedes or enhances it. The AC is charged with identifying guiding principles to lead our Civic Leadership work moving forward.

The Council offers the following five recommendations for the Strategic Planning Committee's consideration:

1. BRAF is uniquely positioned to build a thriving and resilient future for Baton Rouge and beyond.
2. BRAF can do this by focusing its leadership and impact on executing an agenda to expand opportunity through the following areas: economic prosperity, education, healthy families, quality of life, strong and safe neighborhoods, and regional resiliency.
3. Before identifying specific projects, BRAF should develop a robust theory of action for how we will build solutions and engage partners.
4. BRAF should establish and enforce clear selection criteria that ensure organizational resources align with the highest impact and best aligned projects.
5. BRAF should retain some flexibility to respond to emerging opportunities and challenges, especially in moments of crisis, and dream out-of-the-box ideas.

Advisors also identified the following operational enablers that would position the Foundation to fully implement these recommendations:

- Enhance and expand the capabilities of the Foundation to drive systems-level change.
- Create clear and compelling ways for donors of all capacities to engage with and donate to the Foundation's popular civic initiative projects.
- Develop communication strategies that resonate across the community to drive impact.

The remainder of this report details how the Council did its work and additional detail behind our recommendations.

Advisory Council Participants

Preston J. Castille Jr, *Chair*

David M. Beach

J. Wesley Daniels Jr.

Perry J. Franklin Sr.

Alfred E. Harrell III

Beverly M. Haydel

R. Brian Haymon

Lauren Crapanzano Jumonville

Adam Knapp

Charles "Charlie" Lamar III

Kimberly J. Lewis

Casey Phillips

Mike A. Polito

Ross L. Reilly

John M. Spain

Todd D. Stevens

Erin Monroe Wesley

Karen R. Williams, MD

Process Overview

To prepare this report, the Advisory Council met five times and reviewed prework in preparation for each of its sessions. In pursuit of its mission, the Council utilized the following resources (see Appendix B.1 for more detail):

- Research, reports, podcasts, and journal articles on economic mobility and opportunity
- Interviews with Peer Community Foundations

The Council met on the following dates either at the Baton Rouge Area Foundation or via Zoom:

- Wednesday, June 29th, 10:00am-12:00pm
- Monday, July 18, 2022, 3:00 – 5:00 pm
- Tuesday, August 9, 2022, 1:00 – 3:00 pm
- Thursday, September 8, 2022, 1:00 – 3:00 pm
- Monday, October 3, 2022, 3:00 – 5:00 pm

Recommendation #1: BRAF is uniquely positioned to build a thriving and resilient future for Baton Rouge and beyond.

BRAF should anchor its Civic Leadership on a north star: build a thriving and resilient future for Baton Rouge and beyond. Advisors were compelled by the research on economic mobility and opportunity reviewed throughout the Strategic Planning process. This north star will guide the overarching perspective of the Foundation, creating a vision for generations to come.

Advisors agree that meaningful change is needed across several systems to ensure our community and state thrives and delivers meaningful opportunity for future generations. And, throughout this process, advisors have heard from other community organizations focused on expanding opportunity and prosperity in the community. BRAF is especially well-positioned to engage in this work; we are highly respected in Baton Rouge

and beyond, and are one of the few entities that can sustain a vision and a common, positive identity for the community.

Recommendation #2: BRAF can do this by focusing its leadership and impact on executing an agenda to expand opportunity through the following areas: economic prosperity, education, healthy families, quality of life, strong and safe neighborhoods, and regional resiliency.

Compelled by research demonstrating a meaningful improvement in economic mobility when certain domains are prioritized for intervention, advisors supported a focus on economic prosperity and mobility, education, healthy families, home ownership, strong and safe neighborhoods, and regional resiliency. These focus areas provide strategic clarity for the Foundation and its strategic initiatives, ensuring that resources are aligned to our north star.

1. Economic prosperity: Baton Rouge realizes meaningful upward mobility, becomes a magnet to attract talent to our community
2. Excellent education: every child has excellent learning options from cradle to career to unlock and fulfill their potential
3. Healthy families: Baton Rouge among fastest improving cities in health outcomes
4. Quality of life: Baton Rouge is the best place to live and work
5. Strong and safe neighborhoods: every corridor has a plan to spur investment, improve safety, and secure quality housing
6. Regional resiliency: we don't wait on the next crisis to prepare and strengthen our infrastructure and community ties

As one advisor noted, “We could put anything on the list, insert BRAF, and we would make a difference. But when you’re working with limited resources, where will we have the biggest bang for our buck?” Advisors were unwavering in their recommendation that BRAF maintain a strategic focus in its civic leadership activities to amplify its impact.

Recommendation #3: Before identifying specific projects, BRAF should develop a robust theory of action for how we will build solutions and engage partners.

Throughout the course of the council meetings, advisors reviewed deep research, learned from peer experts, and discussed local success stories for implementing systems-level change. One key learning from this process is that deliberate and focused planning has led to the most effective execution in Baton Rouge and across peer institutions.

With this in mind, advisors recommend BRAF spend significant time developing a framework for building solutions that engages with a diverse cross-section of partners. This work should focus on identifying the most effective areas for BRAF to intervene and move the needle on building a thriving and resilient community where our children and grandchildren feel they belong. This, in essence, is the development of BRAF’s theory of action related to civic initiatives.

Recommendation #4: BRAF should establish and enforce clear selection criteria that ensure

organizational resources align with the highest impact and best aligned projects.

As BRAF evaluates potential efforts to support or lead in the community, great consideration should be given to those efforts that align with the organization’s strategic priorities. In general, no initiative should begin without careful community collaboration, rigorous research, and a thoughtful evaluation of potential paths forward.

Advisors recommended the Foundation formally adopt keys to effectiveness for this evaluation. These principles can be used as the Foundation considers a project by sequentially examining the answers to each of these criteria. At any given time, the Foundation will have projects at different phases of evaluation and implementation. And, BRAF should ensure that it isn’t expending limited donor resources before thoughtfully moving through the principles outlined below.

Tactical Recommendations:

Advisors recommended that BRAF consider the following:

- START FROM NEUTRAL:** create a space where ideas can be shared, points of view debated, and consensus forged
- ENGAGEMENT:** conduct meaningful (but not endless) outreach to and input from community leaders and groups that can aid in solution-design and take long-term responsibility for execution
- RIGOROUS SOLUTION DESIGN:** ground solutions to identified challenges or opportunities in root cause analysis, data-driven research, and community-oriented buy-in
- ALIGNMENT:** ensure the proposed solution design fits with BRAF’s core skill set and available financial/human resources
- PARTNER:** pursue force multipliers and partnerships with diverse and effective organizations and leaders in the design and execution of solutions; where necessary, consider creating new entities to drive and sustain impact
- IMPACT:** drive solutions that can ultimately impact systems-level

change, transformation of public policy and/or more effectively leveraging public resources

ACCOUNTABILITY: define success measures for both short- and long-term in the design phase of the project

EXIT STRATEGIES: pass leadership and execution, when appropriate, to other organizations to ensure long-term success

Communicate: maintain long-term communication and engagement of project progress and history to strengthen the Foundation's connection with and impact on the community

Recommendation #5: BRAAF should retain some flexibility to respond to emerging opportunities and challenges, especially in moments of crisis, and dream out-of-the-box ideas.

Advisors spent considerable time in the tension between developing strategic priorities for BRAAF, while retaining the ability to flexibly respond to emerging challenges and opportunities. On the whole, the council believed that establishing guiding principles is critical to the Foundation's ability to drive the most meaningful impact in the community. However, advisors were careful to note that BRAAF's nimbleness has been an asset in specific circumstances that required the ability to flex toward solutions. Specifically, advisors noted the importance of BRAAF retaining the ability to respond to natural and manmade disasters impacting Louisiana. And, the organization has been a valuable convener in allowing members of the community to dream about the "next big thing" that will impact our community. BRAAF should not lose the ability to provide this space in its next iteration of work.

Operational Enablers: Ensure the organization can fully implement the Council's recommendations

Advisors also identified three enablers that should be strengthened to better position the Foundation to fully implement these recommendations:

- Enhance and expand capabilities of the Foundation in support of systems-level change
- Create Civic Leadership Impact Funds to provide flexible funding in support of civic initiatives
- Develop communication strategies that resonate across the community to drive impact

ENABLER A: ENHANCE AND EXPAND THE CAPABILITIES OF THE FOUNDATION TO DRIVE SYSTEMS-LEVEL CHANGE

Advisors spent considerable time discussing the existing capabilities of the Foundation and its staff as well as the skillsets that will need to be enhanced to drive the greatest impact. Advisors noted that as BRAAF takes on systems-level change that drive toward its north star, the Civic Leadership team staffing will be critical. Staff will need to include skilled project managers and conveners, individuals who can drive a project from beginning to end. These individuals will need to be familiar with the communities they are working in and have the ability to build strong relationships. Subject-matter experts may be necessary for the greatest impact in specific efforts, in the same vein as peer community foundations have hired individuals responsible for the execution of specific efforts. Additional capabilities necessary for success may include: data analysis, policy research and design, the facilitation of public-private investment vehicles, telling our story of impact, etc.

ENABLER B: CREATE CLEAR AND COMPELLING WAYS FOR DONORS OF ALL CAPACITIES TO ENGAGE WITH AND DONATE TO THE FOUNDATION'S TRANSFORMATIVE CIVIC INITIATIVE PROJECTS

Advisors noted that peer community foundations have access to unrestricted dollars that enable the success of their civic leadership efforts. These funds are able to be quickly deployed by their Board

of Directors toward a Community Foundation’s priorities. Advisors suggested that the Foundation explore the creation of Civic Leadership Impact Funds and other unrestricted dollars in support of this work.

ENABLER C: DEVELOP COMMUNICATION STRATEGIES THAT RESONATE ACROSS THE COMMUNITY TO DRIVE IMPACT

Advisors discussed the importance of engaging with diverse community members and effectively communicating about its impact to a variety of audiences. As one advisor noted, “BRAAF could enhance the value and impact of its work if it was able to effectively communicate to the broader community how projects drive meaningful difference in the community.” Effective communication strategies will be key to the success of projects.

Final Thoughts & Considerations

Ultimately, this Council and its Advisors believe that these key findings will support the Foundation in deepening its impact across the region in systems-level change, grounded in an organizational north star.

APPENDIX B.4

Sources of Information

- Article: [*A Transformative Moment for Philanthropy*](#)
- BRAAF’s [2021 City Stats](#) report
- Briefing slides: BRAAF’s historical Civic Leadership (archived with Strategic Planning documentation)
- [*Where is the Land of Opportunity? The Geography of Intergenerational Mobility in the United States*](#), Journal Article + Technical Slides
- [Is the American Dream Really Dead?](#) (*Freakonomics* Radio podcast)
- [Raj Chetty in 14 charts: Big findings on opportunity and mobility we should all know](#) (*Brookings*)
- [Closing the Opportunity Gap](#) (Robert Putnam, Harvard Saguario Seminar)
- 2018 BRAAF Strategic Plan (archived with Strategic Planning documentation)
- Foundation for the Carolinas Civic Leadership Task Force Report (archived with Strategic Planning documentation)
- Foundation for the Carolinas [Leading on Opportunity](#) strategic plan
- [“The Economist Who Would Fix the American Dream,”](#) *The Atlantic* (2019)
- Interview with Brian Collier, Executive Vice President at Foundation for the Carolinas

APPENDIX C:

Philanthropy Advisory Council Recommendations

Executive Summary

The goal of the Philanthropy Advisory Council is to help the Foundation build a thriving philanthropic ecosystem in our community and to build its base of fund donors. As part of that effort, the Council explored new ways to engage existing and potential donors, to utilize Foundation Membership to engage new philanthropists, and to create compelling new ways to give.

The Council offers the following four recommendations for the Strategic Planning Committee's consideration:

1. Create clear and compelling ways for donors of all capacities to engage with and donate to the Foundation's popular civic initiative projects
2. Prioritize stewarding existing donors to the Foundation, to deepen and expand existing relationships
3. Invest in new tools and strategies that make philanthropy more accessible and engaging for potential NextGen donors
4. Define a clear value proposition for BRAF Membership, differentiating membership tiers and benefits

Advisors also identified three operational enablers that would position the Foundation to fully implement these recommendations:

- Align staffing structures to development priorities
- Deploy technology to enable greater scale, efficiency, and personalization
- Invest in new communications tools and strategies

The remainder of this report details how the Council did its work and additional detail behind our recommendations.

Advisory Council Participants

Helena R. Cunningham, *Chair*
Annette Barton
Scott Berg
Dr. B. Eugene "Gene" Berry
Danny Fields, CFRE
Carissa Graves

Adrian Owen Jones, CFRE
Charles "Charlie" Lamar III
Leslie Landry, MBA
Charlene Montelaro, CAP®
Dr. Tatiana Patel
Lois A. Smyth

Process Overview

To prepare this report, the Advisory Council met five times and reviewed prework in preparation for each of its sessions. In pursuit of its mission, the Council utilized the following resources (see Appendix C.2 for more detail):

- White papers and articles
- Recorded interviews with major philanthropists
- Panel with Experienced BRAF Donors
- Panel with Next Generation Philanthropists
- Interview with Peer Community Foundations

The Council met on the following dates either at the Baton Rouge Area Foundation or via Zoom:

- Wednesday June 29th, 10:00am-12:00pm
- Tuesday July 12th, 1:00-3:00pm
- Tuesday August 9th, 1:00-3:00pm
- Tuesday, September 6th, 9:00-11:00am
- Tuesday, September 13th, 10:00am-12:00pm

Recommendation #1: Create clear and compelling ways for donors of all capacities to engage with and donate to the Foundation's popular civic initiative projects

Part of what makes BRAF so special to our currently engaged donors is our ability to harness the power of strategic philanthropy to drive civic impact. Experienced donors interviewed by this Council described the Foundation as providing a value-added service that is unique in our community. This also corresponds with feedback this Council received from donors of all experience levels, that named they value seeing the real impact that their giving can make. Donors want to hear/see the human impact stories and know that their gift is making a tangible difference in a community or on a problem.

Today, fundraising and engagement in civic initiatives (CLI) projects has been limited to ad hoc campaigns focused on higher net worth contributors and fund holders. In the future, Advisors counsel that BRAF should create multiple, dedicated avenues in which any donor could potentially participate, driving both greater opportunities for project revenue generation and new ways to engage community members in the work of the Foundation.

TACTICAL RECOMMENDATIONS

- Clearly and proactively communicate BRAF's role and that of our donors in our CLI projects, utilizing social and digital media, email marketing, traditional media, etc.
- Create publicly facing ways for donors of any capacity or experience level to easily contribute to CLI projects; examples could include project-specific campaigns or thematically focused impact funds (e.g., environmental, education, etc.).
- Consider creating dedicated opportunities to engage fund holders formally and regularly in supporting CLI work. For example, establish a multi-year pledge group of DAFs—at least \$5k and up to \$25k per year—to fund CLI Projects or a CLI Impact Fund.

POTENTIAL CHALLENGES:

- Misunderstandings about or appreciation for the Foundation's CLI
- Macroeconomic conditions limit near-term donor capacity
- Selected CLI initiatives or projects may be considered divisive or controversial
- Sensitivity about when we can make a project public

MEASURES OF SUCCESS

- Survey feedback from donors
- Increased donation volume to CLI projects or funds
- Increased donation revenue to CLI projects or funds
- Increased leverage created through national donors, public entities

Recommendation #2: Prioritize stewarding existing donors to the Foundation, to deepen and expand existing relationships

Peer Community Foundations described that the single most important donor strategy they focus on is stewardship, especially emphasizing that

most of their contributions and connections to new donors come from existing donors. Advisors similarly underscored that stewardship of existing donors should be considered a top priority of the Foundation.

TACTICAL RECOMMENDATIONS

- Dedicate staff capacity to donor stewardship; scale staff as donor base and volume grows—encourages team to reach new development targets. Could also invest in staffing to manage different donor profiles, interests, needs, etc.
- Explore solutions that scale, including
 - Robust donor portal experiences
 - Detailed impact reports and giving history
 - Digital quick stewardship—videos from staff and board
 - Donor education and activities
- Set retention and growth goals that are actively managed and monitored
- Systematize regular donor engagement processes; leverage the most experienced staff for top accounts but ensure there is a plan for each fund holder.
- Explore ways to utilize network of existing donors to identify new potential donors.
- Focus on initiatives that encourage succession planning, ensuring the Foundation is proactively build relationships with the next generation of families.

POTENTIAL CHALLENGES

- Recessionary pressure limits donor capacity in the near term
- Other organizations outperforming BRAF donor stewardship
- Transfer of wealth to next generation without relationships with younger donors
- Not enough staff to properly steward all donors

MEASURES OF SUCCESS

- Survey feedback from donors—satisfaction, net promoter score
- Increased membership revenue
- Retention and growth in existing funds
- Retention and growth in membership donations
- Creation of new funds

Recommendation #3: Invest in new tools and strategies that make philanthropy more accessible and engaging for potential NextGen donors

While not a monolith, the next generation of philanthropists are also different from prior generations. Next Gen Philanthropists interviewed by this Council described their giving as engaged and responsive. Peer Community Foundations have begun exploring new ways of engaging these donors (from giving circles to new product offerings); while these efforts are small to date, younger donors tend to be interested in these new offerings.

Advisors counsel that while there is significant mutual value-creation for BRAF and Next Gen Philanthropists, we will need to invest in the development of these donors to fully unlock it.

Advisors further counsel that BRAF must ensure that all donors to the Foundation feel valued, regardless of contribution level. Creating new, lower levels of participation could help a broader constituency feel valued. Valuing time in addition to money is another way to authentically engage more potential philanthropists.

TACTICAL RECOMMENDATIONS

- Reach out to local leadership and development groups like Forum 225, Junior League, or Leadership BR to educate younger donors and create specific ways to engage with the Foundation (e.g., special memberships, class gifts, giving circles, volunteer opportunities).
- Add lower contribution-level membership options to make Foundation membership more accessible for new donors.
- Create opportunities for identifying, growing, and engaging younger generations before they are wealthy—especially emphasize strategies to meet these donors where they already are (versus inviting into the Board Room).

- Proactively foster relationships/mentorship opportunities with current donors—allowing them to bridge with new, younger philanthropists.
- Develop more robust and comprehensive social and digital media presence to engage NextGen Philanthropists.
- Explore new product offerings that may be exciting to NextGen Philanthropists (e.g., mission-related investments/program-related investments, ESG options, giving circles, etc.).

POTENTIAL CHALLENGES

- Changing demographics
- Accessing and engaging NextGen communities
- Lack of awareness about or confusion about BRAF's mission and causes
- Higher initial financial cost to cultivating these NextGen prospects
- Establishing trust with NextGen communities

MEASURES OF SUCCESS

- Increased number of young donors—including members, contributors, or fund holders
- Increased engagement with NextGen Philanthropists—social media, in-person events
- Healthy, thriving, and diverse donor base

Recommendation #4: Define a clear value proposition for BRAF Membership, differentiating membership tiers and benefits

Membership is a compelling and important strategy for BRAF. Advisors enthusiastically agreed that Membership is one of the first and best ways to engage with the Foundation, learning more about our civic initiatives and our philanthropic supports. Today's members represent tomorrow's fund holders. Membership also allows BRAF to grow its reputational influence and to build trust in the community.

To grow Membership, Advisors encouraged BRAF to explore ways to create lower Membership entry levels (e.g., \$100? \$50?), while those that are already members could be encouraged to deepen their relationship with the Foundation through greater giving or new direct participation in civic projects.

TACTICAL RECOMMENDATIONS

- Define membership and what it supports; ensure all staff members can make the “elevator pitch” for membership.
- Create clear, defined membership tiers that balance accessibility with meaningful value. For example:
 - \$50-100 membership could offer an accessible entry point to the network
 - A separate membership group (e.g., Founders' Funders) could create a more exclusive experience, requiring a multi-year pledge of minimum (e.g., \$5k), funding a pool of BRAF initiatives with more access to that work
 - Multi-year membership commitments could further extend/deepen relationships
 - Corporate memberships could drive specific value to businesses and organizations
 - Nonprofit memberships to provide specific supports, better define our relationship with nonprofit partners (e.g., Northshore Community Foundation offers this type of membership)
- Beyond thank you notes and Currents, develop meaningful programming and engagement opportunities for Members, for example:
 - Convenings to learn information and meet others
 - Special introductions to projects, programs, and organizations to members
- Promote the value of BRAF memberships across communications platforms, highlighting:
 - Relationships/networks made by existing donors
 - Projects supported via BRAF membership
 - Individuals who are also BRAF members
- Consider developing membership offerings by interest area (e.g., Arts Membership, Green Membership)—could be aligned by impact fund

POTENTIAL CHALLENGES

- Lots of membership programs in BR
- Donor recognition could become a cumbersome process
- Changing demographics
- Confusion re: membership for fund holders
- Making membership feel both inclusive and exclusive
- Misunderstandings about BRAF's mission and what Membership supports
- Historical lack of clarity around the value of Membership—what do you get?

MEASURES OF SUCCESS

- Survey feedback from Members
- High level of member retention
- Growing and diversified membership
- Increased membership engagement

Operational Enablers: Ensure the organization can fully implement the Council's recommendations

Advisors also identified three operational enablers that would position the Foundation to fully implement these recommendations:

- Align staffing structures to development priorities
- Deploy technology to enable greater scale, efficiency, and personalization
- Invest in new communications tools and strategies

ENABLER A: ALIGN STAFFING STRUCTURES TO DEVELOPMENT PRIORITIES

Advisors emphasized the importance that proper and adequate staffing will have in implementing both these recommendations and any other new initiative of the Foundation. Advisors counsel:

- Ensure there is adequate staffing to properly steward current donors

to the Foundation. New initiatives will create new pressure on existing staff; evaluate the viability of any new initiatives given staff capacity. Poor execution could undermine the value of launching a new program or outreach effort.

- Consider setting revenue generation or fund creation benchmarks to determine when to make the next hire—creates incentives for current team to hit new targets.
- Align staff experience level with donor engagement and stewardship strategy.
- Invest in staff training and development to continue deepening team expertise (e.g., CAP training, 21/64 training, etc.)
- Rapid Membership growth could create staffing challenges; donor recognition and cultivation can be an onerous and labor-intensive process.

ENABLER B: DEPLOY TECHNOLOGY TO ENABLE GREATER SCALE, EFFICIENCY, AND PERSONALIZATION

To offset staffing pressure, Advisors pointed to the ways in which technology could supplement and extend staff capacity. Advisors specifically named that technology allows an organization to develop strong institutional memory around relationships, scale more personalized outreach, and more efficiently serve donors in meeting their philanthropic goals. For example:

- Explore new innovative systems and technology to reach and engage more donors.
- Consider digital quick stewardship—videos from staff and board.
- Invest in a robust donor portal experience, allowing donor to self-serve online, view prior giving, download impact reports, etc.
- Deploy a CRM to ensure staff members record interactions and knowledge about donor interests, priorities, and goals—ensures everyone on staff knows the donor, regardless of who is having the conversation.

ENABLER C: INVEST IN NEW COMMUNICATIONS TOOLS AND STRATEGIES

Experienced donors, Next Gen Philanthropists, and Advisors alike all emphasized the importance of BRAF telling its story of impact.

To encourage individuals at all wealth levels to become engaged with philanthropy, they must first know about BRAF and the difference that their participation could make. Moreover, multiple advisors across each recommendation noted that building trust via storytelling was one of the most important risk mitigation strategies BRAF could deploy.

- Seek feedback regularly to make certain that priorities are current
- Proactively explain BRAF's position on issues/projects and showcase successes
- Expand use of social and digital media to inform and engage younger generations, allowing donors and members to publicly shareable content (e.g., podcasts, Currents articles, etc.)
- Create new methods/avenues to engage with donors/organizations
 - Donor profiles—not just top donors—it needs to be relatable at all levels
 - Project profiles/progress reports—even reporting challenges
- Expand usage of direct conversations and presentations, ensuring they are strategic and purposeful
- Invest in a variety of platforms and communication channels
- Explore expanding current award programs to further highlight membership or community

Final Thoughts & Considerations

Ultimately, this Council and its Advisors believe that these key findings will support the Foundation in deepening its existing donor relationships, cultivating new ones, and supporting the Foundation in growing philanthropic resources available to support its mission and work. In addition to the key findings highlighted in this report, Appendix C.1 also contains a list of great ideas and additional details that may also be useful to the Foundation and its staff.

APPENDIX C.4

Great Ideas to Keep Track Of

A thriving philanthropic ecosystem is one which empowers donors to connect to the causes they care deeply about. Everyone should feel like they can be a philanthropist.

Peer CFs named that professional advisors are an important constituency that, while sometimes a competitor, can also be a key pipeline for validating and connecting with donors; more evidence can be found in the Finance & Investment Advisory Council Interim Report

With corporate clients, engagement, cultivation, and continuing education is key.

- How many of our Employee's 1st companies keep giving to BRAF?
- Great opportunity to get corporate clients engaged, keep them engaged with other services (e.g., Memberships, DAFs, SOs, etc.).
- Opportunity to educate local businesses on how DAFs really work.

Generational wealth-transfer opportunities

- Increasingly, philanthropists are interested in spenddown funds to see how their funds are making a difference during their own lifetimes
- Private and family foundation conversions—trend seen among our peers about these types of entities converting their foundations into DAFs and then going into Designated Funds. Benefits include greater privacy and a reduced administrative burden.
- Others want to maintain their control but like technical support and expertise from community foundations -- contemplating providing fee for services with private foundations or even commercial providers.

APPENDIX C.5

Sources of Information

- Article: [A Transformative Moment for Philanthropy](#)
- Article: [Tax breaks aren't prime reason for high-net-worth philanthropy, study finds](#)
- Briefing Slides: Development & Membership Trends
- Article: [How affluent households gave back in 2020](#) (Bank of America, Indiana University Lilly Family School of Philanthropy)
 - [Full Report](#)
- Video Interview: Bridgespan Remarkable Givers Series—Bernie Marcus, founder of The Home Depot
 - [Bernie Marcus explains why he gives while he lives](#)
 - [Matching gifts: Bernie Marcus recruits new donors to double his impact](#)
 - [Surrounded by successful people: How Bernie Marcus runs his philanthropy](#)
 - Full set of videos available [here](#)
- White Paper: [What's Next for Philanthropy in the 2020s: Big Shifts Reshaping the World](#) (Deloitte)
- Video Interview: Bridgespan Remarkable Givers Series – Emmett Carson, CEO of the Silicon Valley Community Foundation
 - [Generation differences: Emmett Carson says younger philanthropists exhibit four differences from older donors](#)
 - [Keeping up with young philanthropists: Emmett Carson welcomes unconventional ideas from Silicon Valley's innovators](#)
 - [The future of community foundations: Emmett Carson takes an expansive view of community](#)
 - Full set of videos available [here](#)
- Panel Interviews:
 - Experienced Philanthropists:
 - James “Big Brown” Joseph
 - Charles “Charlie” Lamar III
 - Annette Barton
 - NextGen Philanthropists:
 - Kenny Nguyen
 - Sabrina Galloway
 - Jason Hughes
 - Peer Community Foundations
 - Coastal Community Foundation - Darrin Goss, CEO
 - Southeast Michigan Community Foundation – Randy Ross, Vice President of Philanthropic Services

APPENDIX D

Nonprofit Excellence Advisory Council Recommendations

Executive Summary

The goal of the Nonprofit Excellence Advisory Council was to explore how and where the Foundation can uniquely add value within the ecosystem of nonprofit organizations (NPOs). The Council spent considerable time learning about the Foundation's current operations in service of nonprofits, hearing from nonprofit leaders about their experiences with the Foundation and evolving needs, and observing best practices from elsewhere that could be utilized within our region to better serve nonprofits.

Our partners on civic leadership endeavors and donor advised grants are the nonprofit community; cultivating a strong and effective nonprofit sector is critical to realizing our own strategic agendas and supporting our donors in realizing their philanthropic goals. In support of this, BRAF can take on a more coordinated and clearer role in empowering our nonprofit partners and changemakers in our region and state.

After significant discussion, the Council determined that while an ecosystem of nonprofits does exist, it is not as healthy or connected as it has been historically. As such, members of the NEAC established "strengthening the nonprofit ecosystem" as their north star priority. The Council offers the following four recommendations (in no particular order) for the Strategic Planning Committee's consideration as they work towards that goal:

- Continue serving as a convener and regularly assess NPO needs to inform specific support strategies
- Establish or support pathways to encourage new and emerging social entrepreneurs
- Expand opportunities to develop skillsets within and sustainability of established nonprofit organizations and more actively promote financial tools to support their sustainability
- Expand existing communications strategies to amplify the work of existing nonprofits, recruit nonprofits to engage in expanded support services as capacity to serve nonprofits expands, and tell BRAF's story of impact

Advisors did want to highlight that, while financial assistance will continue to flow from our donors to nonprofit organizations doing impactful work in our community, the recommendations outlined in this report are intended to strengthen nonprofits through means other than an infusion of cash from the Foundation. The tactical recommendations outlined focus on helping changemakers and nonprofits build the relationships and skillsets that will help their organization serve our community more impactfully and effectively. Where possible, the Foundation should prioritize assisting nonprofits that also help further progress on Foundation-focused initiatives.

The remainder of this report details how the Council did its work and provides additional context for our recommendations.

Advisory Council Participants

Scott Hensgens, <i>chair</i>	Trey Godfrey
Rodney Braxton	Sara Judson
Tristi Charpentier	Tyler Litt
Emily Chatelain	Adrienne Moore
Lauren Crump	Linda Posner
Charlie Davis	Lois Smyth
Eric Dexter	Michael Tipton
Mark Drennen	

Process Overview

To prepare this report, the Advisory Council met five times and reviewed prework in preparation for each of its sessions. In pursuit of its mission, the Council utilized the following resources (see Appendix D.2 for more detail):

A Transformative Moment for Philanthropy – McKinsey (sent to all advisory councils)

- Panel discussion with local nonprofit leaders
- Survey of nonprofit leaders
- Interview with aspirational peer organization
- Interview with peer Community Foundation

The Council met on the following dates at the Baton Rouge Area Foundation and via Zoom:

- Wednesday, June 29th, 10:00 am to Noon
- Thursday, July 14, 2022, 2:00 to 4:00 pm
- Thursday, August 11, 2022, 12:00 to 4:00 pm
- Tuesday, September 13, 2022, 1:00 to 3:00 pm
- Tuesday, October 4, 2022, 9:00 am to 11:00 am

During their first gathering, the NEAC focused on understanding BRAF's current activities to support the nonprofit ecosystem and conducted a visioning exercise to discuss aspects of a health nonprofit ecosystem. At

meeting #2, the Council heard from a diverse panel of nonprofit leaders representing consulting clients, grantees, and strategic partners of the Foundation during their second meeting. Panel participants were Darlene Adams Rowland (Executive Director, BREADA), Dadrius Lanus (CEO, 100 Black Men), Laura Tuggle (Executive Director, Southeast Louisiana Legal Services), Dianna Payton, (CEO, YWCA) and Lucy Perera (Co-founder, Line 4 Line). Finally, two guest speakers shared potential programming solutions to the hypothesized needs; these guests were Hassan Hassan, CEO of 4.0 Schools, and Jessie Hermann, Vice President of Philanthropy at the Foundation for the Carolinas.

Outside of meeting time, a survey was sent to nonprofit leaders to gather additional feedback. In total, 56 responses were recorded for this survey; detailed findings can be found in Appendix D.3 of this report.

Each of these resources have been considered thoughtfully as NEAC members outlined the recommendations outlined in the following pages.

Recommendation #1: Continue serving as a convener and regularly assess NPO needs to inform specific support strategies.

NEAC members agreed the Foundation's role as a convener is one of our greatest strengths. Additionally, hundreds of community members and nonprofit leaders engaged during the Study & Learn phase have affirmed the benefits and critical nature of the convening role the Foundation plays. Many consider the expanded network of collaborative resources and action as the most substantial benefit of working with us. In addition to being a highly effective activity, advisors emphasized that "convening costs very little" and creates an outsized impact in our community.

Given the Foundation's past success in this area and the perception of it as a high-impact activity, the NEAC recommends that the Foundation

continue to serve the community in this manner. A special note of caution was provided that the Foundation has historically been seen as inviting select nonprofits in for convenings and collaboration; an enhanced effort to go out into the community to support collaboration could be more impactful for the Foundation in the long-term.

Respondents to the NEAC NPO survey regularly thanked the Foundation for their willingness to reach out and learn from real-life experiences of NPOs. Furthermore, nonprofit leaders participating as panelists during meeting #2 affirmed how valuable it is to feel their perspectives are heard and considered by the Foundation. In consideration of that feedback, NEAC members also recommend that the Foundation engage NPOs in regular feedback opportunities so that we can ensure we are in tune with the most up to date NPO needs and activities; this will ultimately enable us to serve as a better informed and more effective convener.

TACTICAL RECOMMENDATIONS:

- BRAF should continue to fulfill role as a convener in our community, facilitating collaboration between public and private entities to achieve a common goal. Emphasis should be placed on convening groups that are mission-aligned with the Foundation's primary strategies as dictated by the final Strategic Framework.
- BRAF should regularly seek feedback from NPOs to gauge ongoing need of these organizations as well as the efficacy of our role as a partner.

POTENTIAL CHALLENGES

- BRAF must overcome the perception of elitism to reach new partners aligned with our objectives and forge strong relationships to foster collaboration. Outreach moving forward must evolve to reflect the Foundation's evolving priorities.
- Expectations must be clearly communicated to collaborating partners to delineate the differences between BRAF's role as a convener and as opposed to the lead agency for the initiative being discussed during convenings.

Recommendation #2: BRAF should establish or support pathways to encourage new and emerging social entrepreneurs.

Council members acknowledged that the existing nonprofit ecosystem often struggles to adopt new, innovative solutions to existing problems. Concurrently, social entrepreneurs are generating impactful ideas but lack opportunities and supports to test their hypotheses or scale proven concepts. As one Advisor noted, "social entrepreneurship is a feature of a vibrant, healthy community."

Taking a direct role in providing opportunities for early-stage social entrepreneurs to conduct concept-scaling and network development can help build a vibrant, healthy community while further strengthening the collaborative ties among nonprofits. Our community can continue to evolve as we inject entrepreneurial solutions into fields that may be operating according to the status quo by default.

"[People] just need an invitation to see themselves as changemakers and entrepreneurs... we need as many innovations as possible and as many smart people as possible to address that"

—HASSAN HASSAN, CEO 4.0 SCHOOLS

Nurturing and creating spaces for emerging changemakers can help support the ongoing work of the Baton Rouge Area Foundation while also supporting partner organizations in their initiatives. A direct example is the possibility of this effort supporting retention of young talent in the Capital Area that may be leaving for New Orleans, Houston, or other cities with the perception or reality of increased support and opportunities; this

is one of five priorities highlighted in the Baton Rouge Area Chamber’s most recent strategic plan. Advisors recommended that the Foundation consider both for- and non-profit entities as eligible participants for these efforts so long as the organizations remain mission-aligned with the Foundation.

TACTICAL RECOMMENDATION:

Conduct a thorough analysis to determine which local resources, if any, exist for BRAF to partner with as assist social entrepreneurs while they strive to scale their endeavors.

Establish a pilot program to support social entrepreneurs as they scale civic-minded initiatives in alignment with the Foundation’s objectives. Afterwards, BRAF will need to assess the efficacy of this pilot to determine if long-term implementation is beneficial to fostering innovation and social impact.

POTENTIAL CHALLENGES:

Significant discussion was held during NEAC Meeting #3 detailing whether we should be the entity to host such a program or, instead, support other organizations with existing programs. The results of the above-proposed pilot should be heavily considered while determining a path forward.

Recommendation #3: BRAF should expand opportunities to develop skillsets within established nonprofit organizations and more actively promote financial tools to support their sustainability

An overwhelming need for continuing education for staff, leadership, and board members was noted. Concurrently, existing BRAF services

supporting NPOs—namely Development Fellows and Strategic Consulting Services—were praised for their “teach a man to fish” approach. These may be implemented through continuation and expansion of existing strategic consulting services, by establishing a speaker series on topics of interest, creating NPO Leader roundtables, or other solutions. Council members emphasized the importance of partnering with existing organizations already offering similar opportunities effectively to ensure efforts are not duplicated.

“It is important to consider the impact that nonprofits have currently and what impact could be realized with added support. Increasing the infrastructure (staffing, space, resources) of nonprofits with a proven track record of success and connecting them with those interested in supporting that could greatly improve quality of life in Baton Rouge.”

—ANONYMOUS SURVEY RESPONDENT

A determination should be made as to whether these services will be offered to all nonprofits or only to those paying for such services through a to-be-determined mechanism such as annual membership dues or a fee-for-service menu. Council members supported the structure currently implemented by Foundation for the Carolinas that primarily has open-access resources, but select, higher-impact networking or education opportunities for organizations affiliated with the Foundation through fund establishment or membership.

Furthermore, panelists and surveyed nonprofit organizations regularly indicated that sustainability and funding were persistent challenges within their organization. In fact, 41.1% of survey respondents classified fundraising as their organization’s #1 pain point, with 70.5% identifying it as a top 3 issue.

“Diverse sources of funding need to be identified to avoid competition among NPOs.”
“[We have] difficulty finding funders who will fund administrative costs.”

“Many nonprofits are unaware of potential funding available in in the community.”

—ANONYMOUS SURVEY RESPONDENTS

Recurring income sources such as those made possible through agency funds can help NPOs forge a pathway to sustainable operating funding for their organizations that can be utilized for expenses that may not be as interesting to modern day donors or sponsors. Additionally, establishment of funds at the Foundation can generate fee income which can then be reinvested into BRAF’s efforts to support nonprofit organizations. Consequently, NEAC members recommend that the Foundation more actively promote existing financial resources and pursue new mechanisms that can help NPO leaders support their efforts without relying on donor advised grants or burdensome sponsorship requirements.

TACTICAL RECOMMENDATIONS:

- Continue the existing Development Fellows program
- Continue to offer detailed strategic consulting services for organizations that align with the objectives outlined in the new Strategic Framework
- High-level aspects of the current services offered by Strategic Consulting Services should be converted to easily digestible content for a wider variety of NPOs. Examples of this could be a monthly speaker series on topics of interest or self-paced, online courses.
 - Potential areas of education include fundraising, collaborating effectively, developing strategic plans, how to be an effective board member, information technology, telling their story, and building donor relations.
 - A nonprofit membership for NPOs utilizing these services may be

considered to help underwrite expenses related to conducting such activities

- Engage in active marketing for existing financial tools available to nonprofit organizations and establish new mechanisms such as Mission/Program Related Investing (MRIs and PRIs) and/or impact funds.

POTENTIAL CHALLENGES:

- Continuing education programs exist in the capital area already; a thorough assessment of existing opportunities should be conducted to ensure duplication of opportunities is limited. Conducting this assessment may delay time to execution.

Recommendation #4: BRAAF should expand existing communications strategies to amplify the work of existing nonprofits, recruit nonprofits to engage in expanded support services as capacity to serve nonprofits expands, and tell BRAAF’s story of impact.

At 51.8%, a very slim majority of NPO survey respondents noted they are familiar with the ways BRAAF supports nonprofits. When considering that 80% of all respondents indicated they have been funded by BRAAF or a donor via BRAAF, a significant gap exists between NPOs who have a relationship with BRAAF and those who are aware of the support provided to NPOs beyond serving as a conduit between donors and their organization.

“BRAAF is missing its own storytelling”

—EMILY CHATELAIN, CEO 3 O’CLOCK PROJECT

Advisors understand that the throughline of humility has been a constant for the Foundation’s communications strategy in the past. They feel this should be maintained but note that owning our past and future success through effective and strategic storytelling will be paramount to growing the Foundation’s credibility as the new framework is implemented.

Separately, the Foundation’s ability to amplify the impact of NPOs in our community through existing communications channels was regularly noted as an asset during AC meetings and Community Conversations. This is an existing nonprofit support mechanism that should continue into the new era of BRAAF.

“Exposing our initiatives through Currents and other publications helped put [our efforts] in front of donors and educate the community about the impact of the work we’re doing”

—DIANNA PAYTON, CEO YWCA

While the Foundation’s ability to share NPO-affiliated messaging was praised, parties unanimously agreed that now is an ideal time for the Foundation to transition from our historical role of “working in the shadows” to share the good work of our Foundation, donors, and members as well as the nonprofits we work with more broadly. A wider array of communications channels should also be considered to expand our reach beyond our current audience.

TACTICAL RECOMMENDATIONS:

Engage in active and regular storytelling to support nonprofits and better communicate the historical and future work of the Foundation. Expand current media reach in support of increased story telling; in particular, more actively pursue digital media strategies to reach a wider audience.

POTENTIAL CHALLENGES:

The Foundation has historically limited communications about the leadership role we have played in this community; special considerations should be given to maintain humility while highlighting our role in successful projects.

Final Thoughts & Considerations

Across all four primary recommendations, the need to align staffing structures to meet those ends was highlighted as an enabling condition for success. A “Center for Nonprofit Excellence” or structure similar to that outlined by Foundation for the Carolinas during their presentation may be a helpful way to encompass many of these proposed changes—particularly items 1, 2, and 4—under one umbrella of oversight.

Advisors also emphasized the importance of conducting thorough environment analyses, particularly regarding establishing an accelerator and expanding continuing education opportunities, to ensure the Foundation collaborates with existing organizations rather than duplicating efforts. Particular consideration should be given to partnering with local organizations where effective partners exist, though regional or national partners can and should be considered when there is a vacuum of expertise within our local market and inclusion of said partner(s) can increase the credibility of a program or initiative.

This report is intended to capture the predominant findings from the process; other notable ideas that we could consider in the future are captured in Appendix D.1.

APPENDIX D.1

Great Ideas to Keep Track Of

SUPPORTING NPOS THROUGH SHARED SPACE

A mechanism proposed for strengthening the nonprofit ecosystem was facilitating access to shared services and space. Advisors highlighted how impressed they were with the dedication to meet this need shown by the Foundation for the Carolinas and the direct correlation FFTC noted between increased NPO engagement and the availability of free meeting spaces.

Though the Foundation does not have the physical resources to provide meeting space in the same way it did at its previous location, NEAC members agreed that the Foundation should consider opportunities to support the need for physical space needs of nonprofits moving forward. In the interim, the Foundation can serve as a referring party to existing resources such as free nonprofit room reservations at any parish library location.

SUPPORTING NPOS THROUGH NETWORKING

NPO leaders voiced interest in general networking opportunities. While they valued the ability to collaborate on specific projects or objectives, they also feel regular networking could be valuable in aligning overall NPO activities and increasing the efficacy of targeted collaborations. Opportunities that had previously been available to these leaders, such as a CEO roundtable, have been discontinued by the organization(s) that once offered them. Though not necessarily the role of BRAF, the foundation could consider exploring ways to re-launch this program through the most appropriate NPO entity in the future.

Advisors indicated that this is heavily intertwined with the concept of collaboration with existing organizations as outlined in our “Final Thoughts and Considerations” report.

APPENDIX D.2

Sources of Information

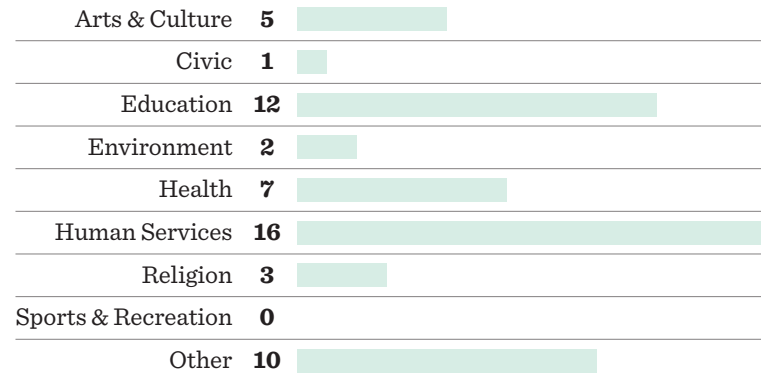
- *A Transformative Moment for Philanthropy* – McKinsey (sent to all advisory councils)
- Panel discussion with local nonprofit leaders
 - Darlene Adams Rowland (Executive Director, BREADA)
 - Dadrius Lanus (CEO, 100 Black Men)
 - Laura Tuggle (Executive Director, Southeast Louisiana Legal Services)
 - Dianna Payton, (CEO, YWCA)
 - Lucy Perera (Co-founder, Line 4 Line)
- Interview with Hassan Hassan, CEO of 4.0 Schools, and aspirational peer organization
- Interview with Jessie Hermann, Assistant Vice President of the Center for Nonprofit Sustainability at Foundation for the Carolinas, a peer community foundation
- Survey of Nonprofit Leaders, responses are outlined in Appendix D.3

APPENDIX D.3

Nonprofit Survey Results

- 56 anonymous responses were gathered from July 9, 2022 through July 31, 2022. In total, 256 emails were tracked as delivered, indicating a 21% response rate for this survey.
- Median time to complete this survey was 6 minutes and 11 seconds.
- The majority of respondents had previously received funding from the Foundation or a donor with Funds at the Foundation. As such, these results are over-representative of groups that have already received support from our Donors or the Foundation itself.
- Due to the anonymity afforded by this survey, we cannot determine if multiple contacts from the same organization have submitted responses, potentially skewing data.

WHICH FIELD BEST CLASSIFIES THE FOCUS OR MISSION OF YOUR ORGANIZATION?

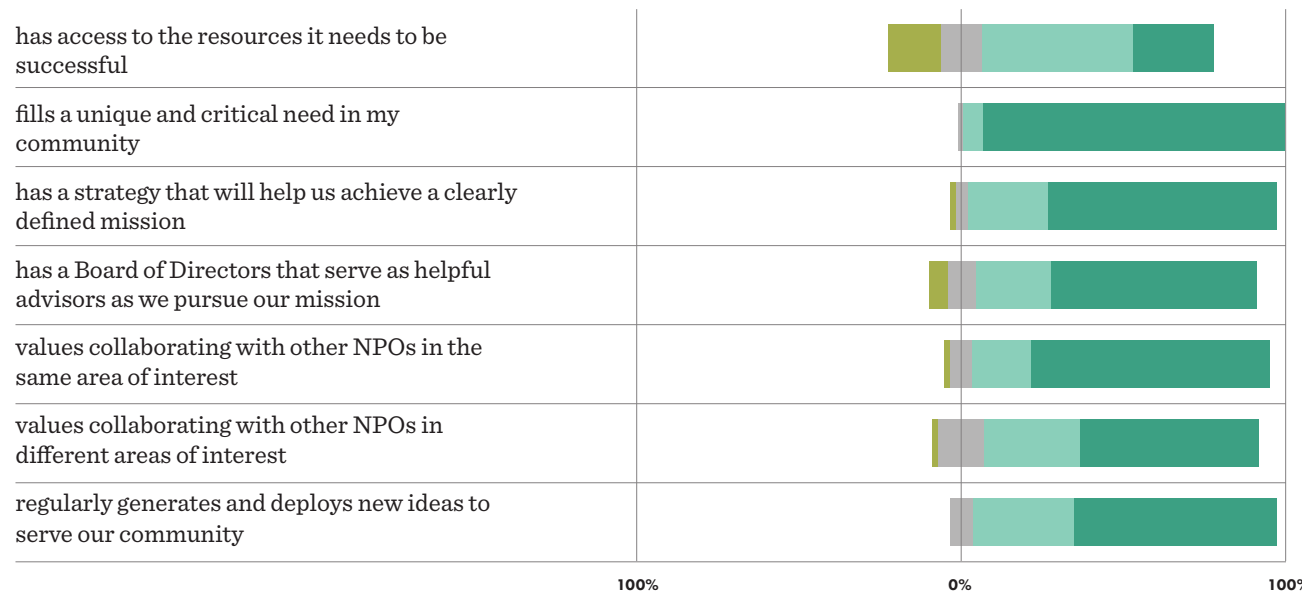


Other:

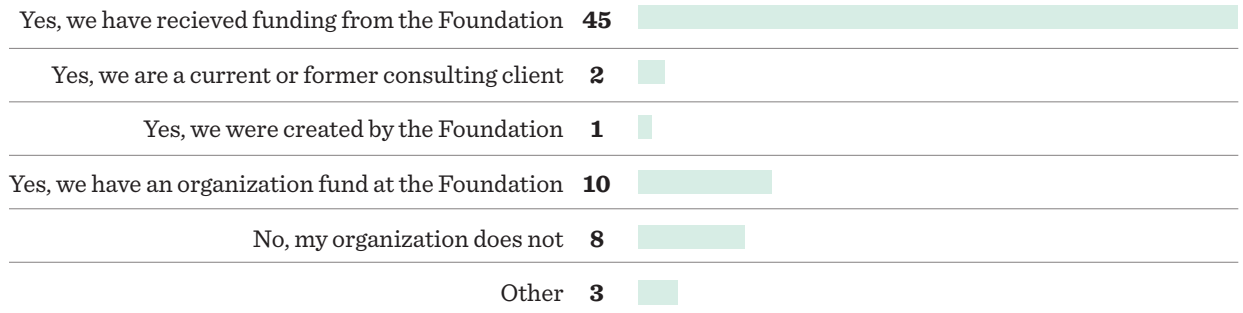
- Animal welfare (2)
- Basic Needs
- Civic
- Planning for a healthier built environment
- Policy research and advocacy
- Social Justice
- Therapy Services
- Wildlife, fisheries, conservation
- Women’s Services
- Youth Development – Scouting

PLEASE INDICATE YOUR LEVEL OF AGREEMENT WITH EACH OF THE FOLLOWING STATEMENTS.

I believe my organization...



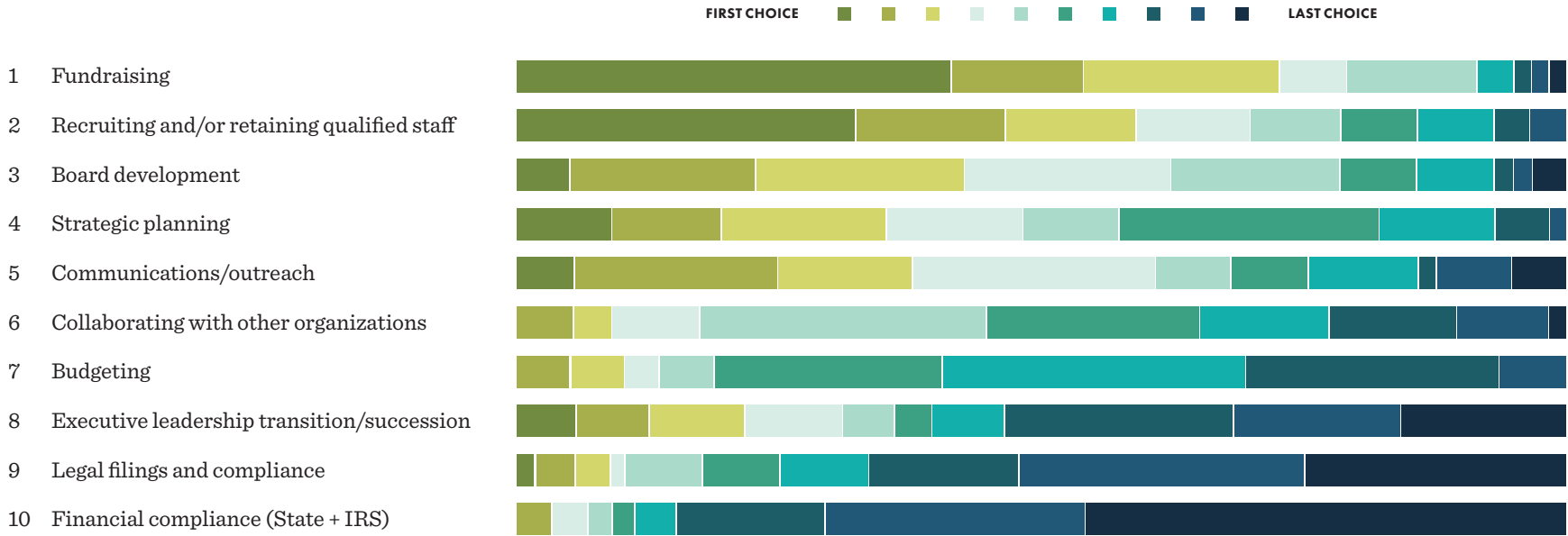
DOES YOUR ORGANIZATION HAVE A RELATIONSHIP WITH BRAF?



Other:

- We have not received funding from BRAF, but consider them a valuable resource. They are vital in connecting people in this community
- We worked briefly with an organization BRAF funded
- Yes, my organization has registered to build a relationship with the foundation but has never been funded

WHAT ARE YOUR ORGANIZATIONAL PAIN POINTS?



WHAT ARE THE STRENGTHS IN THE CURRENT NONPROFIT ECOSYSTEM?

Overall themes:

- **People, both through staff and loyal philanthropists**
- **Collaboration/information sharing, with a particular uptick in recent years**
- **Responsive to community needs**
- **Track record of successfully serving the community**

Detailed responses:

- Mission to meet critical needs for citizens in our metropolitan area
- Nonprofits are learning to collaborate more together than in the past to achieve broader community impact.
- Unity and collaboration among organizations even those with differing missions.
- A lot more energy in recent years around collaboration.
- Service to the community
- Great mission and leadership.
- The strengths in the current nonprofit ecosystem are reputation and impact.
- There are many ideals
- Guaranteed state money (through the MFP) in these uncertain economic times.
- Meaningful work that addresses diverse array of needs; providing resources and action that improves lives and community life
- BRAF provides tremendous leadership in the Baton Rouge community through it's focused giving.
- Willingness to collaborate, flexibility, adaptability.
- Mission
- People who care
- There are a lot of people who want to do good work and have at least an ostensible desire to collaborate.
- Louisiana and the Baton Rouge area is a very giving community. Despite the economy, the community members still find ways to give. Sometimes that means giving their time or finding creative ways to give in-kind donations rather than monetary donations.
- Content. We are a content house for emotional well-being in young learners.
- There are several very strong organizations that have weathered COVID and actually walk the walk as opposed to just talking the talk.
- I think that many organizations want to collaborate and tackle big issues. I find the nonprofit ecosystem supportive.
- The biggest strength in our community is the willingness among nonprofits to work together towards mutual goals. Rare in our community is the organization that is not interested in collaborating.
- Clear vision with laser focus, strong strategic plan, rapid growth
- Nonprofits value collaboration and sharing connections. I've seen also seen a positive shift in funders and their grant/giving processes.
- Happy supporter typically stay with nonprofits that are good stewards of the donor dollar.
- Focusing on decreasing the educational achievement gap, learning loss and building social and emotional competence.
- The nonprofit ecosystem has been great at cultivating professional development for professionals working in Human Service organizations. It is also great at creating network and training opportunities.
- We are a statewide organization which increases the resources and bandwidth of our nonprofit ecosystem. We have a strong support systems with our nonprofit partners where we submit joint proposals to national foundations, we develop strategies together and have a

strong coalition. Our coalition meets weekly and we began receiving a lot more resources once we started developing joint proposals and thankfully have the support of the Foundation for Louisiana to demonstrate local philanthropic support.

- The ability to grow a stronger community through donors in the areas of giving and volunteerism.
- I believe the nonprofits in Baton Rouge have a tremendous ability to collaborate and support each other. Over the last few years, I have seen a significant shift in the attitude behind collaborating amongst nonprofits—particularly those serving in a capacity to meet basic human needs. When I first entered this industry 7 years ago there was a sense of competition amongst non-profit leadership in the city, I have since witnessed an understanding come about that we are all here to serve the city and bring our clients out of poverty into a healthy, happy, hopeful life.
- Quality well trained staff. Opportunities to reach and mentor a lot of kids
- Longevity and results
- The Baton Rouge community recognizes the benefits of our organization, data supports our accomplishments, stable organization.
- I believe our nonprofit sector covers the community needs spectrum that provides needed services. The nonprofit sector freely shares best-practices for others to learn from. The AFP Chapter is strong and provides resources for the fundraising professionals.
- Community of enthusiastic consumers of arts and culture.
- There are many quality organizations doing excellent work to better our community. Many are well-run and have impactful programming.
- Baton Rouge nonprofit impact seems visible to the public and gets a lot of coverage. I'm not sure how things are perceived in more rural areas/parishes in the broader area of metro BR. Also I see resource

sharing among and across some groups. Strong board leadership for some organizations.

- Healthy Partnerships.
- I think that most local nonprofit leaders are open to suggestions, work well with each other. There are some very talented people working on a multitude of issues.
- Non profits are providing critical services to under resourced and underrepresented population within the community.
- There are lots of organizations doing good work. And many of these organizations also love to partner. There are also micro organizations that have a huge impact.
- BRAF is a terrific community developer; we are so grateful for the support of BRAF
- Innovative programming and response to the community's needs
- LATAN's longevity as a viable and relevant NPO for 30 years, as well as having a mission and scope to serve people of all ages throughout Louisiana. As a nonprofit, LATAN has the opportunity to be continuously responsive to the needs of the communities we serve while focusing on quality-driven care.

WHAT ARE THE WEAKNESSES IN THE CURRENT NONPROFIT ECOSYSTEM?

Themes:

- **Uncertainty in funding sustainability/continuity and diversification of local funders**
- **Funding also leads to recruiting and retaining qualified staff members**
- **Large organizations tend to receive the lions-share of donations, making it difficult for smaller organizations to thrive**

- **Despite uptick in collaborative efforts in recent years, duplication of efforts persists**
- **NPOs have ongoing educational needs including how to be better communicators, collaborators, and donor developers.**

Detailed responses:

- Siloed work of nonprofits. Not enough cross collaboration. Difficulty finding funders who will fund administrative costs.
- Many nonprofits are unaware of potential funding available in in the community.
- Uncertainty in funding sustainability
- Not enough in-state funders supporting this work.
- Going to the same big donors for money.
- Need more qualified employees. Need help fundraising.
- The weakness in the current nonprofit ecosystem is sustainable growth.
- Funding for boots on the ground nonprofits
- Staffing.
- Resources to operate; duplication of services; effectiveness in carrying out mission.
- I am concerned that BRAF has reduced other funding opportunities. It's great if you are friends with the 1,000 pound gorilla, but otherwise...
- Too many valuable and needed non-profits and not enough donors to support them all.
- Board engagement/development
- Finding & retaining the right people
- Community engagement
- Limited resources to support mission
- Only a handful of nonprofits have the sort of community profile that enables them to continuously drive major amounts of fundraising. There are lesser-known organizations in the community doing strong work that more donors would give to if they had a bigger profile.
- There are so many different nonprofits in Louisiana and in and around Baton Rouge that the competition for dollars is extraordinary. Community members can feel overwhelmed by the amount of need that they are paralyzed into inaction.
- Developing a go-to-market strategy to bring “The Merryville Stories” from our elementary curriculum to the public at large.
- There are too many nonprofits and too many performing the same functions. There is insufficient collaboration and too much focus on individual organization as opposed to coming together to address issues without regard to recognition.
- Many nonprofit professionals have very little time and bandwidth to give to collaborative projects outside of their organization as their workloads are already too heavy.
- Many of the funders in the current BR and statewide are seeking new high numbers, low touch, high exposure opportunities to fund. Some of the solutions that are not sexy, not terribly innovative but achieve continuous results are overlooked. While we recognize innovation is critical to solving or attempting to solve these complex issues in our community for the vulnerable sometimes the solutions are basic and evidence based.
- Customer user experience (funnel), systems integration and automation.
- There still seems to be a barrier to nonprofits efficiently collaborating and sharing connections.
- For such a relatively small service area, there are multiple nonprofits and companies working toward the same mission. While this can be

helpful, it can also divide and be less effective for the community.

- Larger gifts to assist with nonprofit growth are becoming less available.
- Events/marketing for companies are becoming more of a requirement for non profits to get pledges of support. Rather than staying mission based and focusing dollars fully on the cause, it's taking staff resources (time and money) to create experiences that are sponsorship worthy.
- Continuous funding and recruiting and/or retaining staff and students.
- The financial structure is inefficient at creating and delivering demand-side solutions. The management structure is inefficient and outdated and pathways to truly scalable solutions are often gated behind legacy philanthropy.
- I do not see a strong nonprofit ecosystem in the baton rouge region. However, I think that the Wilson Foundation has been building the capacity of the ecosystem since the pandemic. However, I still see very disjointed activities amongst the nonprofits and quasi governments that work in our mission area.
- To stay innovative in order to attract area philanthropists to give additional grants to help build capacity in providing growth capital to scaleup the work needed in the community in area of health and human services.
- Overall I've seen nonprofits have a hard time bouncing back from COVID. Many nonprofits in the city had to lay off employees to be able to continue to serve the community. At the same time, this is not a weakness it has to cause a fault line in the way that we are able to continue to function now that the need has increased significantly in the last two years. Now more than ever, the community needs food, housing, and utility assistance for some event recovery. Unfortunately, the staffing shortage has prevented obstacles in providing those services that can only be overcome by having a full-function staff again.
- The ability to fund raise with any consistency.
- More fosters and money for Executive Director
- Sustainability in terms of leadership and location. We need to develop leadership to sustain the organization and we need to think about sustaining the site in the community.
- I see sustainability as a weakness. Too many exist on a shoestring of funding and have never developed reserve funds. The old attitude of a "Starving nonprofit" still exists instead of being more business-like in their planning, funding, resource allocation, and ability to track and communicate their impact.
- LANO doesn't exist anymore, we lack the resources to assist nonprofits develop best-practices. The new LAN does not provide what LANO provided and its basically unknown.
- Social media is changing fundraising and there is a big learning curve to adapt to social media funding. Nonprofits need assistance with how and where to spend their funds to meet their goals for fundraising, creating awareness, reaching constituents ...everywhere.
- Small pool of significant donors in the Baton Rouge community.
- Greater support is always needed. This is true as it relates to donors and to public officials. I believe there is also a need to improve, generally speaking, pay for nonprofit professionals. Local nonprofits typically also have difficulties publicizing their offerings and successes, which affects both potential impact and funding.
- Not enough foundation giving in Louisiana to help balance relying on corporate or individual giving. Only wanting to fund new projects or one-time giving. Through our larger network I see what the nonprofit ecosystem is in states like Texas, Florida, California, east coast states -- they seem to have more foundations that support the work because there is more wealth. Fostering more collaboration, skills training, supporting nonprofit professionalism, volunteer leadership among younger generations. I'm becoming more aware of how we have ignored equity issues in some mission areas and/or communities.

- We believe our local community has too Many Duplicate service providers.
- duplicated services-lack of collaboration
- I'm not certain of how coordinated our efforts are within related fields. There are some mission overlaps.
- Diverse sources of funding need to be identified to avoid competition amongst non-profits.
- There are large organizations that take away opportunities from smaller organizations that actually do the work because they have the finances to meet strenuous. There are white organizations with resources that present themselves as Black organizations when there are ZERO people in leadership and organizational decision-making that actually represent the communities they serve.
- Probably same as always for most~ meeting big community needs with limited human and financial resources to deliver
- Finding strong writers and communicating our story
- LATAN offers specialized services, so recruiting experienced staff and/or staff having technical expertise in the field of Assistive Technology/complex rehabilitation services is a huge challenge. While the latter can be identified, having funding to adequately compensate seasoned rehabilitation professionals is difficult.
- Too few funders and everyone competing for the same donors. Concerned about the transfer of wealth to the next generation which does not seem as philanthropic or willing to serve on boards.

WHAT ELSE WOULD YOU LIKE FOR US TO KNOW?

Themes:

- **NPOs are appreciative of BRAF's historical support**
- **Those without clear ties to the Foundation are interested in building those relationships**
- **Opportunities for talent/skill development persist:**

fundraising/appealing to donors, communications, and collaboration with other orgs repeatedly noted

- **Access to reliable funding is a significant challenge for NPOs**

Detailed responses:

- We would love to get inroads and insights on how to raise more financial support from Louisiana-based individuals and foundations.
- Many nonprofits are doing vital work in the region but are not funding or supported by the foundation because they don't have equitable access or representation with the organization.
- We appreciate all that BRAF has done in support of our mission!
- Thanks!
- We appreciate every effort BRAF makes in helping the nonprofit community.
- We value the expertise BRAF offers. We have enjoyed a long relationship with BRAF and many donors. We look forward to working with Chris in his new role and wish him all the best!
- We could do so much more if we could come together bringing our diverse expertise to collaborate for change!
- I very much appreciate the work the Baton Rouge Area Foundation does to support and strengthen the nonprofit community. I think the Development Fellows is an invaluable resource to nonprofit organizations.
- We are grateful for the leadership role that BRAF has taken and continues to take.
- Appreciate your service to the community
- Thank you for the opportunity to share.
- I hope that this survey leads to a meaningful conversation in the community.
- How can we connect with BRAF about organization that share the same mission as First Tee of EBRP

- More marketing ideas
- Law enforcement and the Mayor's Office know the benefits of our organization and it seems that funds should be made available to sustain our organization rather than for us to live with uncertainty year after year.
- The nonprofits don't know the new Exec at BRAF like they knew John Davies. We are watching to see him develop his style and how BRAF will move forward. We have great hopes for him and our community's future.
- It is important to consider the impact that nonprofits have currently and what impact could be realized with added support. Increasing the infrastructure (staffing, space, resources) of nonprofits with a proven track record of success and connecting them with those interested in supporting that could greatly improve quality of life in Baton Rouge. I imagine that is at least part of the equation of this survey being conducted...
- In the past I've found it difficult to establish a relationship with BRAF to talk about our organization or look for any collaboration potential. I hope that's changing. We have stable funding mainly due to bequests received in the past 5 years that has made up for shortfalls in our five avenues of fundraising to support programs and mission.
- Our organization is small but has a very strong core and successful program. Our organization provides housing and services to women (most have children) who desire to recover from substance abuse and/or dual diagnosis. We provide housing and services to the sober employed women until the women reach a livable wage. These women all are in the ALICE population or below. We struggle (like many) with increased funding to increase our staff in order to increase number served in our community. Thank you.
- I appreciate the opportunity to share what we know. Thank you for the survey.
- Given the extensive individual and community impact made by nonprofits, they need to be positioned for future sustainability.
- As an accredited and federally funded NPO, LATAN relies on grants to supplement its budget. For the past five years, LATAN's key strategy to address funding limitations has been to diversify

- its funding streams by focusing on public and private, commercial insurances which will expand the scope of services offered to this community. Building this type of "practice" has been slow but steady.
- Wish BRAF had more open funding opportunities.

APPENDIX E

Communications & Community Engagement Advisory Council Recommendations

Executive Summary

The goal of the Communications and Community Engagement Advisory Council was to source new ideas that engage current stakeholders and reach new communities. The Council was charged with generating recommendations to build Foundation awareness and trust in the broader community.

Following the learning phase of the Strategic Planning process, the Council offered the following recommendations for the Strategic Planning Committee's consideration:

1. Broadly communicate Foundation products, services, initiatives, and projects—and the impact of each—to clarify organizational goals, establish credibility, inspire trust, and encourage public adoption of initiatives and projects.
2. Use Foundation communications to instill civic pride among residents, recruit new talent, and retain existing talent.
3. Increase and diversify membership to reflect the population of the Foundation's service area.

Advisors also identified the following operational enablers that would position the Foundation to fully implement these recommendations:

- Organize historical project data.
- Invest in robust customer relationship management (CRM) systems.
- Invest in new communications tools, strategies, and expertise.

The remainder of this report details how the Council completed its work and additional recommendation details.

Advisory Council Participants

Todd S. Manuel, *Chair*
 Kelly Bienn
 Taylor Bennett
 Michael Bonnette
 Stephanie Cargile
 Ann Edelman
 Sabrina Galloway
 Sherreta Harrison

Brandon Kelly
 Kenny Nguyen
 Chelsea Norris
 Dennise Reno
 Matthew C. Saurage
 Beverly Brooks Thompson
 Mukul Verma

Process Overview

The Communications & Community Engagement Advisory Council met three times during the learning phase and twice to compile and refine final recommendations.

- The Council began by reviewing BRAF's existing communication platforms and strategies. The Council also completed a visioning exercise.

- Then, the Council reviewed effective communication strategies from cross-sector organizations like community foundations, corporate foundations, financial service corporations, and recreation and park commissions.
- In the third meeting, the Council completed an exercise describing high-quality customer service experiences as a metaphor for learning how BRAF can best communicate its strengths to prospective clients.
- Meeting four synthesized all key learnings.
- And meeting five translated those learnings into final recommendations.

*See Appendix E.1 for more detail.

Recommendation #1: Broadly communicate Foundation products, services, initiatives, and projects—and the impact of each—to clarify organizational goals, establish credibility, inspire trust, and encourage public adoption of initiatives and projects.

KEY LEARNING #1: BRAF HAS AN OPPORTUNITY TO REPACKAGE EXISTING CONTENT FOR NEW AUDIENCES AND NEW PLATFORMS.

- BRAF has a reputation for creating high-quality communications materials.
- With the changing landscape of media consumption, these materials can be repurposed for new platforms (social media) and new demographics.

TACTICAL RECOMMENDATIONS:

- Activate or employ the following professionals:
 - videographers and video editors,
 - Photographers,
 - storytellers, and
 - data reporters.
- Create a website section that illustrates each initiative/project's journey and impact.

POTENTIAL CHALLENGES:

- Staffing and time allocation
- Software and hardware required for content creation
- Budget allocation for media development and engagement
- Resources required to manage the brand and all content

MEASURES OF SUCCESS

- New donors, including a wider base of participatory gifts
- Growth in social media metrics, eCurrents, website visits, and donor advised funds
- Media accuracy, as defined by the Foundation
- Pre- and post-brand awareness survey results
- Increased membership, fund contributions, and donations

KEY LEARNING #2: BRAF HAS A STRONG HISTORY OF PULLING OFF COMPLEX PROJECTS; INTERPRETING AND PERSONALIZING THESE STORIES CAN HELP BRING NEW RELATIONSHIPS TO THE TABLE.

- BRAF has often demurred from taking credit or media attention for the sake of giving its partners and donors the spotlight.
 - While this strategy has earned BRAF tremendous respect among its partners, it has also created confusion as to who BRAF is and what its role is among the general public.

TACTICAL RECOMMENDATIONS:

- Activate or employ the following professionals:
 - Writers who can translate data/numbers into relatable impact
 - Video producers
 - Content managers

- Data analysts
- Digital media strategists
- Breakdown initiatives and projects into simple language and social media-acceptable character counts.
- Formalize information sharing partnerships with entities collecting complementary data

POTENTIAL CHALLENGES:

- Community pushback against issues considered hot button (race, religion, politics, etc.)
- Enough resources
- Transparency that results in increased criticism

MEASURES OF SUCCESS:

- Increased brand awareness, as demonstrated by pre- and post-launch survey result
- Increased membership, funds growth, and word of mouth
- Increased Foundation promotions by external entities
- Increased, favorable perception, as indicated by community-wide sentiment analyses

KEY LEARNING #3: BRAF PARTNERS HAVE THE POTENTIAL TO BE ITS GREATEST COMMUNICATIONS ASSETS; IF BRAF EQUIPS THEM WITH CONTENT AND SUPPORTS THEM IN TELLING ITS STORY, BRAF CAN CREATE A WIN-WIN EXPERIENCE.

- BRAF has a deep history of developing strong and meaningful relationships in the community; BRAF has often asked the community to support it with time and resources on its individual projects, but not as its ambassadors. This represents untapped potential in its communication strategy.
- If done thoughtfully, cross-promoting with these key partners can open both BRAF and its partners up to new and expanded networks of influence.

TACTICAL RECOMMENDATIONS:

- Activate or employ professionals with a depth of city knowledge.
- Include people and organizations unfamiliar or dissatisfied with the Foundation.
- Invest in and deploy sophisticated customer relationship

management (CRM) tools.

- Identify initiatives and projects, within the community, that are complementary to the Foundation's; co-determine and communicate measurable alignment; invite those initiative/project leaders to host or facilitate coordinated meetings within their communities
- Separate the Foundation's donor and member web experience from the public's initiative and project repository

POTENTIAL CHALLENGES:

- Enough resources
- Including other organizations and community members requires much time and communication.
- Clearly outlining expectations and the investment required

MEASURES OF SUCCESS:

- Social media metrics
- Increased subscriptions to Foundation communications

Recommendation #2: Use Foundation communications to instill civic pride among residents, recruit new talent, and retain existing talent.

KEY LEARNING #4: COMMUNICATION ABOUT BRAF'S PROJECTS REPRESENTS AN OPPORTUNITY TO RECRUIT AND RETAIN YOUNG TALENT ACROSS OUR REGION.

- The best and brightest often leave Baton Rouge and the southeast region for more opportunities elsewhere.
 - This demographic frequently cites quality of life improvements as key reasons for choosing their new location.
 - The Baton Rouge Area Foundation, however, has long been involved in tremendous quality of life improvements across the region that collectively tell a story of what our community can be.

TACTICAL RECOMMENDATIONS:

- Activate or employ the following professionals:
 - storytellers with brand messaging expertise, and
 - project analysts.
- Welcome external ideas at new initiatives/projects' outset.
- Release strong messages simply and early, through multiple channels, with community ambassadors at the forefront.
- Segment stories by audience and message such that each person immediately recognizes how Foundation project success aligns with their personal values

POTENTIAL CHALLENGES:

- Identifying enough Foundation initiative/project benefits to justify support from a representative sample of the community

MEASURES OF SUCCESS:

- Increased contributions from or engagement by new entrants and sectors that Foundation initiatives and projects benefit
- Increased membership, donors, followers, and partners
- Membership tied to specific projects
- Increased, favorable perception, as indicated by community-wide sentiment analyses

Recommendation #3: Increase and diversify membership to reflect the population of the Foundation's service area.

KEY LEARNING #5: BRAF HAS AN OPPORTUNITY TO RETHINK ITS VALUE PROPOSITION WITH MEMBERSHIP, USING FOUNDATION COMMUNICATIONS AS THE PRIMARY PLATFORM TO ANNOUNCE BENEFITS, OPPORTUNITIES, AND UPDATES.

- Membership represents an enormous opportunity for the Foundation to drive influence and buy-in from a large swath of the community.
- The Foundation has historically struggled with the value-add

of various membership levels and responding to the changing perspectives of newer generations.

TACTICAL RECOMMENDATIONS:

- Activate or employ customer service experience professionals and people who can build diversified content that tells one story, in several ways.
- Create a strategic plan for giving.
- Conduct donor research, and learn which existing donors can introduce BRAF to potential donors.
- Survey existing and potential donors on what incentives they wish to receive.
- Identify underrepresented demographics; engage and enlist leaders within those populations to serve as Foundation ambassadors, community hosts, and facilitators
- Use digital media tracking tools to identify audience preferences; push follow-up stories and relevant content (as indicated by digital engagement) throughout the year

POTENTIAL CHALLENGES:

- Identifying the values of BRAF donors
- Purchasing and maintaining robust, internal systems to capture donor preferences
- Identifying incentives that add value for members

MEASURES OF SUCCESS

- Increased membership, fund contributions, and donations
- Retained membership
- Increased, diversified membership, giving, and engagement across all demographic categories
- Incentives produce new members at intended levels.

ENABLING CONDITION A: ORGANIZE HISTORICAL PROJECT DATA.**TACTICAL RECOMMENDATION**

- Update the Foundation website to feature a searchable repository of all civic leadership initiatives and projects.
 - Each initiative and project should include impetuses and supporting research, timelines, all news and Foundation

Communications coverage, funders, partners, notable members/advocates, and new project leaders with contact information.

- Consider interactive maps to help illustrate the Foundation's contribution to the region and initiative/project's communities.

JUSTIFICATION

- Centralized repositories—
 - Provide historical record of Foundation community engagement and leadership.
 - Improve access to information, thereby increasing transparency and accurate reporting for media or other external entities.
 - Improve project/initiative visibility.
 - Increase productivity for entities who need to cross-reference Foundation work.

ENABLING CONDITION B: INVEST IN ROBUST CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEMS.

TACTICAL RECOMMENDATION

- Implement software that captures all factors important to members, donors, and partners' decision making, including (but not limited to) race, age, gender, income, educational experience/affiliations, neighborhood(s) or community/communities of interest, philanthropic interests, etc.
- Capture all interest- and stakeholders' communications preferences including, (but not limited to) in-person meetings, phone calls, emails, text messages, US mail, specific social media platforms, and news sources.
- Note all touch points, including (but not limited to) Foundation relationships (board/staff/donors/members), reasons for engagement, attended meetings/events, and Communications subscriptions.
- Recognizing that all grant applicants (regardless of outcome) are also customers, offer funding decision feedback to increase process transparency and encourage future engagement.

JUSTIFICATION

- CRMs enable organizations to better know their customers.
- Profiling individuals helps create opportunities to segment

information by key message and audience, identify and project engagement trends, and honor customer preferences.

ENABLING CONDITION C: INVEST IN NEW COMMUNICATIONS TOOLS, STRATEGIES, AND EXPERTISE.

TACTICAL RECOMMENDATION

- Hire a firm to create an interactive website, including video that humanizes initiatives/projects.
- Dedicate staff to updating the Foundation's initiatives/projects repository, as often as Foundation and partner updates are available (up to daily).
- Dedicate staff or a firm to creating or organizing the initial CRM database.
 - Train staff in each department to update the CRM, once organized, so all organizational perspectives are reflected.
 - Track grievance trends and resolutions.
- Hire a content manager to oversee all content creation informed by digital clickthrough and CRM learnings; VP of Communications to ensure voice continuity between platforms.
- Create a writing style guide for organizational and contractor reference.

JUSTIFICATION

- Communications is how people understand and disseminate the Foundation's work.
 - Dedicating sufficient staff to each level of the customer experience ensures the Foundation's communities have relevant, timely, and high-quality interactions with its initiatives, projects, and engagement opportunities.

Final Thoughts & Considerations

The Communications & Community Engagement Advisory Council fundamentally believes that BRAF should express its achievements, as an organization and partner. The Council offered recommendations intended to help the Foundation to reach more stakeholders, through personalized messaging, across a variety of platforms.

APPENDIX E.1

Sources of Information

- Article: *A Transformative Moment for Philanthropy*
- BRAF's *2021 City Stats* report
- BRAF's *Q2 2022 Currents* magazine
- BRAF's 2018-22 Strategic Plan (archived with Strategic Planning documentation)
- Briefing slides: BRAF's historical Communications (archived with Strategic Planning documentation)
- BRAF Annual Meeting 2019: *Big Brown* video
- BRAF's 2010 – 2021 membership data (archived with Strategic Planning documentation)
- BRAF's *Baton Rouge Lakes public meeting* notice
- www.braf.org
- BRAF Peer Study (archived with Strategic Planning documentation)
- The Chicago Community Trust: *Building Collective Power* video
- Fidelity Charitable: *A Smarter Way to Give* video
- www.schwabcharitable.org
- www.vanguardcharitable.org
- Minneapolis Park and Recreation Board: 2021 – *July 2022 Racial Equity Action Plan – March 2022 Update*
- Minneapolis Park and Recreation Board: *Parks for All* video

APPENDIX F

Governance & Supporting Organizations Advisory Council Recommendations

Executive Summary

The goal of the Governance and Supporting Organizations (SOs) Advisory Council is to surface best practices in board and committee governance and structure and to establish guiding principles by which we evaluate, support, and engage with supporting organizations. The Council spent considerable time in the tension between promoting mission-driven work, while ultimately supporting the Baton Rouge Area Foundation's bottom line.

The Council offers the following five recommendations for the Strategic Planning Committee's consideration:

1. BRAF should analyze and establish standards for its SO fee structure, balancing the desire for mission-driven work with appropriate support for Foundation staffing and resources
2. BRAF should create an SO policy framework to guide future Supporting Organization relationships
3. BRAF should contemplate the creation of a "Community Foundations for Louisiana" (or equivalent) to serve as a conduit for Supporting Organization relationships beyond the greater Baton Rouge area
4. BRAF should examine the effectiveness of each board-appointed committee and SO board membership in terms of governance, impact, and information sharing

5. BRAF should update board governance processes and structures to facilitate more strategic, efficient and effective engagement

Advisors also identified the following operational enablers that would position the Foundation to fully implement these recommendations:

- Align staffing structures to maximize operations of supporting organizations
- Prioritize community engagement and representation such that the Board of Directors is clear on strategic decisions that impact disparate communities
- Continually evaluate the effectiveness of newly implemented structures so that they can be updated as necessary

The remainder of this report details how the Council did its work and additional detail behind our recommendations.

Advisory Council Participants

Jeffrey W. Koonce, *Chair*
 Thomas J. Adamek
 T.A. "Tim" Barfield, Jr.
 S. Dennis Blunt
 Susan Bonnett Bourgeois
 Devon J. DeShields

Edmund J. Giering IV
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Process Overview

To prepare this report, the Advisory Council met five times and reviewed prework in preparation for each of its sessions. In pursuit of its mission, the Council utilized the following resources (see Appendix B for more detail):

- Research and reports on governance best practices
- Presentation by local governance best practices expert
- Interviews with Peer Community Foundations
- Policies and fees structure of Peer Community Foundations, as it relates to their Supporting Organizations

The Council met on the following dates either at the Baton Rouge Area Foundation or via Zoom:

- Wednesday, June 29th, 10:00am - Noon
- Wednesday, July 13, 2022, 8:00 - 10:00 am
- Monday, August 8, 2022, 10:00 am - Noon
- Friday, September 9, 2022, 8:00 - 10:00 am
- Monday, October 3, 2022, 10:00 am - Noon

Recommendation #1: BRAF should analyze and establish standards for its SO fee structure, balancing the desire for mission-driven work with appropriate support for Foundation staffing and resources

BRAF Supporting Organizations can and should further the Foundation's mission by extending our reach into new geographic areas and by leveraging newly available grantmaking resources. As the

Columbus Foundation put it, "By our involvement with our Supporting Organizations, we're able to leverage their grantmaking funds in the community to support the things that are really important that we don't have the grantmaking funds to cover."

While Advisors believe that all Supporting Organizations should further the mission of BRAF, they recognize a need to support the bottom-line operations of the organizations.

TACTICAL RECOMMENDATIONS:

- Advisors believe a base fee is critical to protecting the Foundation. This may be a minimal fee determined by asset size, for example. Then, a menu-based fee structure can be adopted based on the activities each Supporting Organization will participate in with the Foundation.
- Advisors recommend reviewing the Columbus Foundation's fee structures and policies as a starting point in evaluating new fees for BRAF.
- Advisors recommend maintaining the opportunity for customization so that potential relationships are not lost based on a standardized system, so long as the Foundation's interests are protected.
- In the event that furthering the mission of a Supporting Organization requires financial resources from BRAF, advisors suggested maintaining a fee-based relationship and issuing grants to drive the mission where appropriate.
- Employees 1st, community affiliates, and, as appropriate, other Supporting Organizations should evaluate and develop a fee policy for their respective operations as well as its relationship with BRAF. When necessary and when undue financial burden does not fall on the Supporting Organization or BRAF, flexibility may be maintained.

POTENTIAL CHALLENGES:

- Existing Supporting Organizations have fee agreements in place that may make a transition challenging. BRAF should prioritize new Supporting Organization relationships and negotiate with existing Supporting Organizations on a case-by-case basis.

Recommendation #2: BRAF should create an SO policy framework to guide future Supporting Organization relationships

Historically, BRAF Supporting Organization recruitment and support has followed an entrepreneurial spirit whereby each relationship was highly customized. As the number and effectiveness of Supporting Organizations has grown, BRAF needs to create a foundational policy that articulates what it will and will not compromise on in terms of its relationship with Supporting Organizations. Ultimately, this policy will serve as a guidebook from which negotiations may begin and then customization will follow.

TACTICAL RECOMMENDATIONS:

- Advisors recommend starting from the Columbus Foundation’s policy framework in crafting a new policy framework for BRAF
- Advisors suggested some non-negotiables in terms of policies for Supporting Organization relationships which may include:
 - The BRAF President & CEO (or his/her designee) should serve as a Board member of each BRAF Supporting Organization
 - BRAF would have the right to appoint a majority of the SO board members (making it a “type I” SO)
- Advisors suggested some potential policies that should be evaluated on a case-by-case basis as follows:
 - Consolidation of staff across Supporting Organizations into the BRAF team. Advisors noted that this may prove challenging when cultural differences are present among potential or existing Supporting Organizations that already have staff in place
 - Requiring Supporting Organizations to publicly disclose their relationship to BRAF (or the “Community Foundations for Louisiana” as explained below). As an example, in public statements a Supporting Organization would say: “...a gift of the Lauren and Ben Jumonville Supporting Organization of the Baton Rouge Area Foundation

POTENTIAL CHALLENGES:

- Existing Supporting Organizations do not have established policies in place with BRAF which may make a transition challenging. BRAF should prioritize new Supporting Organization relationships and negotiate with existing Supporting Organizations on a case-by-case basis.

Recommendation #3: BRAF should contemplate the creation of a “Community Foundations for Louisiana” (or equivalent) to serve as a conduit for Supporting Organization relationships beyond the greater Baton Rouge area

As BRAF considers the implications of its relationships with Supporting Organizations that cover geographies beyond Baton Rouge, the creation of a “Community Foundations for Louisiana” (or equivalent) was supported among Advisors.

This new structure would allow for optimal cover in these extra-geographic relationships. As one Advisor stated, “The strength that lies in the Baton Rouge Area Foundation name in East Baton Rouge Parish is your greatest barrier everywhere else.”

Additionally, the economies of scale created by utilizing one entity for this purpose are numerous. One Advisor noted that “eliminating redundancies [through this vehicle] allows us to drive our mission and the mission of our Supporting Organizations so much further.”

TACTICAL RECOMMENDATIONS:

- BRAF should explore utilizing a disregarded entity for this purpose

so as to minimize the expenses and IRS compliance requirements of forming a new nonprofit organization.

- Advisors also recommended that upon creating this new structure, the Foundation should create a value proposition for new Supporting Organizations to actively recruit them into the fold.

POTENTIAL CHALLENGES:

- Pending the final structure, the creation of this new vehicle could prove onerous. Advisors noted that if the process proves too costly or challenging, the optical benefits may not be worth it.

Recommendation #4: BRAAF should examine the effectiveness of each board-appointed committee and SO board membership in terms of governance, impact, and information sharing

While major decisions as to organizational strategy are made in Board meetings, most of the work that supports and implements this decision-making occurs at the committee level and sometimes the SO level. As such, BRAAF should evaluate the effectiveness of the current committee and SO board structure and membership in terms of furthering its strategic mission.

TACTICAL RECOMMENDATIONS:

- Evaluate membership of all committees and SO boards, balancing the importance of longstanding membership with the energy and new ideas of fresh faces
- Consider a non-binding “matrix” of skillsets and community perspectives that must be incorporated into board membership
- Evaluate the existence of all Board-appointed committees to

determine their effectiveness in furthering the mission of the Foundation

- Similarly, consider creating new committees where such committees would be helpful in furthering the Foundation’s mission. This may include a development/membership, human resources/compensation, and/or Supporting Organization committee
- All committees should be chaired by current board members
- Every committee member must be a member of the Baton Rouge Area Foundation
- Establish procedures to ensure the Board receives relevant information related to the activities of the Board committees and SO boards

Recommendation #5: BRAAF should update board governance processes and structures to facilitate more strategic, efficient and effective engagement

The BRAAF Board of Directors is the most critical engagement staff maintains in the community. This governing body ensures strategic alignment to the Foundation’s mission, propels its standing in the community, and facilitates the growth of organizational resources.

Advisors encouraged BRAAF to enhance its board governance processes and structures to ensure the highest level of strategic engagement and offer the following tactical recommendations for consideration.

TACTICAL RECOMMENDATIONS:

- The Foundation should have a timely and effective board orientation that ensures broad understanding of all components of BRAAF (including Supporting Organizations, financials, etc.)
- The Board of Directors should complete an annual board evaluation
- The Board of Directors should have opportunities for active and newly appointed Board members to integrate into a well-functioning

team that ensure members know each other enough to trust their intention and motivations

- Board meetings should be largely devoted to strategy and next horizon issues, rather than report outs from staff and committees
- The Board should utilize a strong committee structure that is trusted to complete their work. Reports and minutes from these committees should be sent well in advance of Board meetings, with limited committee briefings within meetings
- BRAF should incorporate continued learning opportunities for board members, through canvas trips, research on best practices, and other modalities

Operational Enablers: Ensure the organization can fully implement the Council's recommendations

Advisors also identified three operational enablers that would position the Foundation to fully implement these recommendations:

- Align staffing structures to supporting organizations
- Prioritize community engagement and representation such that the Board of Directors is clear on strategic decisions that impact disparate communities
- Continually evaluate the effectiveness of newly implemented structures so that they can be updated as necessary

ENABLER A: ALIGN STAFFING STRUCTURES TO MAXIMIZE OPERATIONS OF SUPPORTING ORGANIZATIONS

Advisors noted that with the implementation of these recommendations, the support for existing and future Supporting Organizations must be appropriately staffed. As currently operationalized, multiple departments and individuals on the Foundation's staff work with different aspects of each Supporting Organization without BRAF senior-level coordination. Advisors strongly supported the creation of a Vice President of Supporting Organizations to operationalize these recommendations and serve as an ongoing relationship to Supporting Organizations.

ENABLER B: PRIORITIZE COMMUNITY ENGAGEMENT AND REPRESENTATION SUCH THAT THE BOARD OF DIRECTORS IS CLEAR ON STRATEGIC DECISIONS THAT IMPACT DISPARATE COMMUNITIES

Advisors spent considerable time discussing the importance of relationship building across the community. Specifically, three key aspects of engagement and representation were discussed as metrics to keep an eye on:

- The philosophy of the Board of Directors and senior management on community engagement: do members of the community feel they "belong" as part of the Baton Rouge Area Foundation community?
- The representation of diverse communities and perspectives on BRAF's staff and board: do members of the community "see themselves" in BRAF's leadership?
- The strategic decision to accept a Supporting Organization or create a new non-profit that may be perceived as competition to existing business enterprises: do members of the community feel ostracized or in direct competition with BRAF's Supporting Organizations?
 - This concept should be considered as a factor in a strategic decision to accept a Supporting Organization, but not be viewed as prohibitive.

ENABLER C: CONTINUALLY EVALUATE THE EFFECTIVENESS OF NEWLY IMPLEMENTED STRUCTURES SO THAT THEY CAN BE UPDATED AS NECESSARY

Advisors noted the importance of accountability in each of these recommendations to ensure they are functioning as intended. On a regular basis (perhaps annually), the impact of these recommendations in action should be evaluated. BRAF, including board and staff, may consider evaluating the following questions:

- Does the new fee structure appropriately support the Foundation's operations directed toward Supporting Organizations?
- Has the new fee structure hindered the recruitment of new Supporting Organizations?
- Does the new policy framework appropriately capture the necessary policies that must be in place to protect both BRAF and the Supporting Organization?
- Has the new policy framework hindered the recruitment of new Supporting Organizations?

- Has the Board enhanced its strategic engagement during and in between Board of Director meetings?
- Are Board-appointed committees effectively executing upon the strategic direction of the Board of Directors?
- Has the adoption of the enterprise model created economies of scale and reduced redundancies as expected?
- Has the adoption of the enterprise model reduced confusion among potential and current donors and grantees?
- Has the adoption of the enterprise model supported the recruitment of additional Supporting Organizations?

Final Thoughts & Considerations

Ultimately, this Council and its Advisors believe that these key findings will support the Foundation in deepening its board engagement, supporting existing and future Supporting Organizations, and enhancing its effectiveness in extending its mission. In addition to the key findings highlighted in this report, Appendix A also contains a list of great ideas and additional details that may also be useful to the Foundation and its staff.

APPENDIX F.1

Great Ideas to Keep Track Of

- Follow-up with Northshore Community Foundation and Community Foundation of Southwest Louisiana on Corporate Realty Trust and its role in acquiring, managing, and disposing of real estate assets
- Philanthropy/Communications & Community Engagement
 - As currently operationalized, there are no geographic limitations in our grantmaking, creating a selling point for Supporting Organizations & other funds of the Foundation
- Consider tracking “influenced grants” when Foundation staff suggests

grantmaking activities to SOs, DAFs, and other donors and the grant is approved

- Our peers utilize Supporting Organizations as the vehicle for their Civic Leadership Initiatives, leaning on their Civic Leadership staff (or equivalent) as a community research team. This structure may be beneficial for the Foundation to consider as a tool in executing on our Civic Leadership efforts.

APPENDIX F.2

Sources of Information

- Article: [A Transformative Moment for Philanthropy](#)
- Article: [Foundation Board Leadership](#)
- Briefing Slides: An overview of BRAF’s Supporting Organizations (archived with Strategic Planning documentation)
- Columbus Foundation Supporting Organization Fee Structures (archived in BRAF Strategic Planning documentation)
- Columbus Foundation Supporting Organization Policy Framework (archived in BRAF Strategic Planning documentation)
- Community Foundation Panel and Individual Interviews:
- Columbus Foundation: Tami Durrence, Vice President of Supporting Organizations
- Community Foundation of Southeast Michigan: Matthew Lewis, Director of Governance and Operations
- Omaha Community Foundation, Vanessa Denney, Director of Philanthropic Services
- Board Governance Best Practices Interview:
- Donna Saurage, Community Volunteer Extraordinaire
- Board Governance Best Practices Notes, by Donna Saurage (archived in BRAF Strategic Planning documentation)

APPENDIX G

Finance & Investment Advisory Council Recommendations

Executive Summary

The goal of the Finance & Investment Advisory Council is to explore strategies to better understand the financial health of the organization, identify and leverage emerging trends in the philanthropic services sector, and develop new strategies for communicating the Foundation's unique value add to external stakeholders.

The Council offers the following four recommendations for the Strategic Planning Committee's consideration:

1. Explore strategies to grow BRAF's operating and unrestricted resources
2. Clearly define the "BRAFF value proposition" to potential donors, members, and fund holders
3. Deepen and expand relationships with Professional Advisors, especially "noncompetitive" PAs
4. New tools and strategies could energize not just Next Generation Philanthropists, but current donors too

Advisors also identified two operational enablers that would position the Foundation to fully implement these recommendations:

- Deploy technology to enable greater scale, efficiency, and personalization
- Invest in new communications tools and strategies

The remainder of this report details how the Council did its work and additional detail behind our recommendations.

Advisory Council Participants

Bill Balhoff, *Chair*
Daniel Gardiner
John Walton Barton
Donna Fraiche
Jay Johnson

J. Gerard "Jerry" Jolly
Kevin Knobloch
John B. "Jay" Noland Jr.
Debbie Pickell

Process Overview

To prepare this report, the Advisory Council met five times and reviewed prework in preparation for each of its sessions. In pursuit of its mission, the Council utilized the following resources (see Appendix G.2 for more detail):

- White papers and articles
- Group discussions
- Interviews with Peer Community Foundations

The Council met on the following dates either at the Baton Rouge Area Foundation or via Zoom:

- Thursday July 14th, 10:00am-12:00pm
- Thursday August 4th, 2:00-4:00pm
- Thursday August 25th, 1:00-3:00pm
- Tuesday September 20th, 9:00-11:00am
- Monday October 3rd, 1:00-3:00pm

Recommendation #1: Explore strategies to grow BRAF's operating and unrestricted resources

Growing our financial base is not a means unto itself, but a key part of empowering the Foundation to grow its impact across our community. Despite solid asset growth for the enterprise over the last 5 years, budget-relieving operating income has stagnated during that same period—growing our operating revenues would allow the organization to expand its staffing model and make funds available to invest into projects.

For example, the Omaha Community Foundation (OCF) views fee revenue from assets as a critical component in driving its impact strategy. Asset growth begets fee revenue which in turn allows the Foundation to increase its capacity to serve. Based on a review of its financials and data provided by OCF and FFTC, neither organization appears to fundraise for its annual budget. Instead, fee revenue makes up >95% of operating revenue. Currently, BRAF generates ~65% of its operating income from fee revenue, requiring the organization to make up the difference with income from unrestricted income and annual fundraising.

“The more assets you have, the more money you can make to carry out the mission and do more in the community... Fee revenue helps us to get some bandwidth to get the staff to the level needed to drive impact”

—OMAHA COMMUNITY FOUNDATION

TACTICAL RECOMMENDATIONS

- In the near-term, increase focus on growing membership to raise immediate resources to invest in team capacity. Explore opportunities to engage younger generations of Members while deepening relationships with higher capacity members.
- Over the long-term, develop and deepen relationships with current and prospective fund holders to grow fee revenue to offset the need for annual operating support. Planned giving is an especially important way to grow fee-generating assets or even a dedicated operating endowment.
- Utilize part of increased operating revenue to formalize a dedicated development function responsible for engaging new donors, stewarding current donors, and building out robust near-term and long-term revenue generating strategies. This investment in development capacity will ultimately yield sustainable income for civic leadership and community support.
- Activate BRAF's Board of Directors, current members, donors, and fund holders to engage their own networks and share why they partner with the Foundation for their philanthropic giving.
- Engage national foundations and explore federal funding programs to raise funds in support of the Foundation's civic initiatives.
- Consider offering differentiated investment options to current and potential fund holders.

POTENTIAL CHALLENGES

- Perception that BRAF does not appreciate smaller gifts and that only very high net worth individuals can engage with the Foundation
- Online or for-profit brokerages may be viewed as more attractive
- Competition and push back from other charities in community
- Current macroeconomic environment, potential recession leading to a reduction in AUM and fee revenue

MEASURES OF SUCCESS

- Number of new members by class/category
- Growth in AUM and unrestricted assets
- Growth in funds
- Growth in fee revenue
- Increasingly diversified and expanding donor base
- Fee revenue representing more of operating revenues
- Increasing BRAF's grantmaking capacity to support community needs

Recommendation #2: Clearly define the “BRAF value proposition” to potential donors, members, and fund holders

Since BRAF won't be able to compete solely on price with online brokerages, BRAF must be able to tell its holistic story of impact to remain competitive. Advisors emphasized the importance of telling BRAF's story of impact in growing not just our philanthropic base but our future civic impact as well. Advisors further expanded that telling our story should involve differentiated messaging for different stakeholder groups, including professional advisors, younger donors, nonprofit organizations, etc. Donor Advisors and Agency Funds may have different feelings about prices and price sensitivity, so ensuring each type of fund holder sees a distinct value proposition is critical.

“I feel like our biggest competitor is commercial DAFs—we can't compete on fees, but we have an incredible value-proposition.”

—OMAHA COMMUNITY FOUNDATION

Advisors further named that thoughtful and strategic communication of financial performance could be an important part of telling BRAF's story. Focusing on BRAF's asset base signals our size but could further perpetuate misunderstandings about how much discretion and control the organization has over all types of assets. Instead, BRAF could focus communications on its more limited discretionary spending, emphasizing the importance and impact of Membership and direct gifts to BRAF. Similarly, Foundation for the Carolinas (FFTC) described sharing different performance metrics with different stakeholder groups. For some stakeholders, a large asset base signals credibility (institutions, HNW individuals). In other spaces, an emphasis on unrestricted assets or grantmaking activity is a better representation of the Foundation's impact/credibility builder.

“When talking with nonprofits or personal/family clients, we try to focus more on discretionary versus donor-directed assets. We don't want it lost in translation that a \$4B foundation doesn't have \$50M to give away every year”

—FOUNDATION FOR THE CAROLINAS

TACTICAL RECOMMENDATIONS

- Clearly and repeatedly communicate how BRAF makes positive community/local impacts with both grants and leadership, unlike online brokerages

- Share how BRAF creates leveraged philanthropic opportunities for donors vis-à-vis its civic leadership initiatives (e.g., every dollar donated to a Civic Initiative generates an average 20x return in additional investment), while expanding opportunities for donors of all capacities to participate (e.g., establish impact funds or public fundraising campaigns for specific projects)
- To increase transparency about BRAF's grantmaking work, communicate how donated funds are used and the corresponding impact created.
- Emphasize locality of the Foundation, how it serves as a convener of people that care about common causes and issues impacting our community.
- Emphasize BRAF's ability to both lead civic initiatives and adeptly serve donors with local giving priorities. Promote our ability to provide detailed insight into local nonprofits and support with charitable giving priorities. Actively elevate nonprofit needs and opportunities to our donors
- Consider creating new forums for engaging donors, e.g., focused giving groups, stewardship reports, annual meetings, improved online access, transparent performance data, etc.
- Create targeted and differentiated messaging for different types of stakeholders with unique charitable giving goals, capacities, and time horizons.
- Continuously evaluate how the impact/efficacy of messaging to ensure the desired outcomes are being achieved.

POTENTIAL CHALLENGES

- Balancing the need to engage new donors while sufficiently stewarding existing BRAF donors
- Successfully differentiating our message for unique donor types
- Controversial, failed, or unpopular civic initiatives could hurt donor interest, as would BRAF being seen as political
- Pricing our services too high to cause donors to leave BRAF or not invest with BRAF

MEASURES OF SUCCESS

- Number and amount of donor support
- Level of impact of civic initiatives
- Increasing community awareness of BRAF

- BRAF total active donors
- Growth members and contributions
- Volunteer hours

Recommendation #3: Deepen and expand relationships with Professional Advisors, including CPAs, attorneys, and other financial services professionals

Peer community foundations emphasized the importance of Professional Advisors (PAs) as a critical constituency. Professional Advisors include CPAs, attorneys (especially in the field of estate planning), brokers, financial planners, private bankers, and other professionals in the financial services sector. PAs serve as validators in the community, connectors to potential fund holders and donors, and partners via their respective versions of “Keep Your Broker”. Both community foundations invest significant organizational and staff time in developing robust relationships with this stakeholder group. Tactics to engage include advisory committees, continuing education opportunities, sponsoring CAP study groups locally, and dedicated programming. Both CFs also have dedicated expertise on staff to that they are viewed as respected experts and resources for local PAs.

Today, BRAF currently has \$7.4M across ten funds invested via our Qualified Institutional Investment Program (aka “Keep Your Broker”). In contrast, FFTC and OFC have large portfolios associated with their analogous partnership programs, indicating these programs have been an area of growth in their portfolio in the recent past. Perhaps more importantly, “noncompetitive PAs” (e.g., attorneys and CPAs) were identified as significant potential partners in educating their clients in working with the local community foundation on planned giving and major gifts after a liquidity event.

“I would classify [Professional Advisors] as our most important referrals—so many people don’t make that decision to come see us unless their PA tells them to come visit us.”

—OMAHA COMMUNITY FOUNDATION

TACTICAL RECOMMENDATIONS

- Convene PA’s to educate them on how BRAF works, our capabilities, and impact. Especially emphasize our civic leadership role in the community and key areas of distinction from for-profit brokerages (e.g., our flexibility to accept complex assets)
- Invest additional time and resources in staffing and building out a robust Professional Advisory Council consisting of not just investment advisors, but also estate attorneys and CPAs
- Create value-added (and accredited, where possible) experiences and programming for this community, including conducting seminars and educational events (continuing education) on philanthropy-related topics (e.g., CAP study groups)
- Deploy BRAF’s credentialed team members to share more about the Foundation at speaking engagements and professional events for PAs
- Explore technology that allows PAs and their clients to interact with the BRAF donor portal
- Identify which fund holders and members are already PAs and grow our network vis-à-vis these connectors

POTENTIAL CHALLENGES

- Lack of interest or pushback from advisors fearful of losing assets or relationship
- Many organizations trying to do the same thing
- Technology needs for reporting/tracking

MEASURES OF SUCCESS

- Increase in size and number of Keep Your Broker accounts
- Growth in planned and major gifts
- More engaged professional advisory community who are

knowledgeable about BRAF’s offerings

- More donors/AUM resulting from solicitations/connections made by PAs

Recommendation #4: Investigate new tools and strategies to remain competitive for new and current donors

As BRAF explores engaging Next Generation philanthropists and retaining current fund holders, Advisors encourage the Foundation to explore new tools and strategies to remain competitive with other philanthropic outlets. Surveying current and potential donors could be an important part of gathering data to understand where commonalities and points of difference exist between different donor types and generations. Advisors also counsel that BRAF implement data systems that allow the organization to track donor data to benchmark where it currently is with different cohorts of donors and fund holders, to identify where future development and cultivation efforts could be targeted.

It is not yet entirely clear to what extent new investment strategies and offerings are critical to differentiating BRAF, but example offerings could include: ESG investment strategies, improved technology, targeted messaging, unique engagement opportunities (e.g., volunteering, tours), lower contribution levels, and competitive fees. Membership is also an existing mechanism that could easily be retooled to target and engage both potential donors and reactivate existing donors.

“Growth in MRIs and PRIs has been a huge focus for our development team.”

—FOUNDATION FOR THE CAROLINAS

Our peers are similarly looking at remaining competitive. For example, to engage Next Gen Philanthropists, OCF has implemented new giving vehicles, including a community loan fund, affinity-based funds, community philanthropy, lower price point giving options, and quasi-giving circles. This was done in reaction to younger donors looking for ways to engage with OCF at lower contribution levels, with more hands-on engagement. In response to donor demand, FFTC has created an MRI offering so donors can offer NGO's affordable loan options. While not a large part of their portfolio currently, FFTC anticipates strong growth in this program in the coming years.

“You really see the push [for new offerings] among the younger generations.”

—OMAHA COMMUNITY FOUNDATION

TACTICAL RECOMMENDATIONS

- Explore new philanthropic tools and vehicles that are attractive to both Current and Next Gen Donors; utilize focus groups and survey data to assess interest and focus time. Potential vehicles include:
 - Mission-related and program-related investments
 - Affinity-based funds
 - Community philanthropy
 - Giving circles
 - ESG investments or dedicated portfolios
 - Improved/enhanced technology offerings (e.g., online portal, performance reports, information about giving opportunities)
 - Volunteering opportunities
- As recommended for other constituencies, activate our current donors and board/committee members to engage their own networks, share why they choose to partner with the Foundation
- Differentiate communications strategy by cohort. For example, Next Gen Philanthropists may be less concerned with total assets or organizational prestige; instead, they may be more focused on impact
- Leverage technology to meet all donors where they are. Make it easier for them to donate via small dollar gifts or contributions (e.g., smart phone app), or to engage with the Foundation as they please.

- Focus on multiple tiers of “next generations”. For example, build out the 45-55 year-old board leadership to shrink the age gap to the “Next Gen”.
- Consider offering lower contribution level vehicles for philanthropic engagement (e.g., online-only fund, or impact funds)

POTENTIAL CHALLENGES

- Spending too much time/resources chasing too few dollars, and changing programs/policies to attract a constituency that is still developing its philanthropic preferences and priorities
- Identifying and engaging Next Gen Philanthropists
- Ensuring adequate staffing to focus on these new offerings and constituency

MEASURES OF SUCCESS

- Diversification of BRAF's donor base and lowering of average age of donors
- Increased engagement of new Next Gen members and volunteer engagement

Operational Enablers: Ensure the organization can fully implement the Council's recommendations

Advisors also identified two operational enablers that would position the Foundation to fully implement these recommendations:

- Deploy technology to enable greater scale, efficiency, and personalization
- Invest in new communications tools and strategies

ENABLER A: DEPLOY TECHNOLOGY TO ENABLE GREATER SCALE, EFFICIENCY, AND PERSONALIZATION

Peer Foundations like OCF also explained that the rapid expansion of its Qualified Investment Advisor program (aka Keep Your Broker) was facilitated by technology that automated real-time integration between its accounting system and broker systems. Despite these current efficiencies,

OCF remains focused on continuing to improve its technology and donor portal offerings, to better engage existing donors and remain competitive in today's landscape. Advisors counsel that while the Foundation has been successful with DAF creation, technology could provide donors with even more specific information and opportunities for grantmaking, enhancing their experience with the Foundation. Example tactics could include:

- Mine information to give leadership knowledge of better opportunities
- Take advantage of the additional options that are available on the current software platform
- Create platforms to drive enduring user engagement (e.g., online accounts, donor tracking, visibility into how funds are used)
- ID community initiatives to be funded with crowdfunding/small dollar donations
- Increase ease of online payment—Apple Pay, etcetera
- Use technology to allow donors to engage BRAF how they want—completely online, hybrid, traditional communication channels, face-to-face
- Robust charitable giving portal with charitable strategies and methods of giving for donors and professionals
- Information on charities and projects to fund
- More frequent access to find balance information for donor advised funds

ENABLER B: INVEST IN NEW COMMUNICATIONS TOOLS AND STRATEGIES

Peer Foundations and Advisors alike emphasized the importance of BRAF telling its story of impact. To encourage individuals at all wealth levels to become engaged with philanthropy, they must first know about BRAF and the difference that their participation could make. Moreover, multiple advisors across each recommendation noted that building trust via storytelling was one of the most important risk mitigation strategies BRAF could deploy.

- Targeted communications using social media and emails
- Target messaging and reporting to the audience. More traditional donors (institutions/HNW) are more likely to appreciate asset base and legacy, while Next Gen are more likely to appreciate social impact going forward.

- Seek feedback regularly to make certain that priorities are current
- Proactively explain BRAF's position on issues/projects and showcase successes
- Expand use of social and digital media to inform and engage younger generations, allowing donors and members to publicly shareable content (e.g., podcasts, Currents articles, etc.)
- Create new methods/avenues to engage with donors/organizations
 - Donor profiles—not just top donors—it needs to be relatable at all levels
 - Project profiles/progress reports—even reporting challenges
- Expand usage of direct conversations and presentations, ensuring they are strategic and purposeful
- Invest in a variety of platforms and communication channels

Final Thoughts & Considerations

Ultimately, this Council and its Advisors believe that these key findings will support the Foundation in strengthening and communicating its financial performance in order to advance our mission and work. In addition to the key findings highlighted in this report, Appendix G.1 also contains a list of great ideas and additional details that may also be useful to the Foundation and its staff.

APPENDIX G.1

Great Ideas to Keep Track Of

- By challenging preexisting orthodoxies, organizations can evolve in fast-changing industries.
- Learnings from OCF
 - We do a 3-year budget—that's been incredibly helpful—given our Finance Committee and Board the confidence we can afford our new hires or grantmaking requests

- Reach out to donors that haven't been using their funds; don't want the money to sit with us; want to ensure it's going back out to the community
- As the next generation takes over these SOs, they're converting into DAFs—don't want to be as public with their giving
- Learnings from FFTC
 - FFTC has established dedicated centers of giving to better serve different donors. Centers include:
 - Center for Nonprofit Sustainability
 - Center for Personal and Family Giving
 - Center for Corporate Philanthropy
 - FFTC offers a wide variety of investment options to potential fund holders, coupled with strong policies. Potential investors can select from a continuum of more conservative to more aggressive investment pools, but optionality is restricted by fund size and investment horizon. FFTC also has policies in place including lock-up rules and clear policies about how/when an illiquid investment can be exited. These policies are transparently displayed on the website and are included on the front-end of a conversation.
 - We tend to look at three benchmarks when we establish our budgets. Expenses should be:
 - <10% of gifts
 - <10% of grants
 - <1% of assets
- A donor is more than the sum of their contributions
 - I heard about raising money for donors, but not necessarily a lot of engagement thereafter
 - I think money is just the starting point of an engagement
 - We can also leverage the networks and relationships and time of a donor to generate a multiplier effect

- Total donor engagement is what we should evaluate

APPENDIX G.2

Sources of Information

- Article: [A Transformative Moment for Philanthropy](#)
- Article: [Flipping Orthodoxies: Challenging Traditional Assumptions About Your Philanthropy](#) (Deloitte)
- White Paper: What's Next for Community Philanthropy (p. 2-5)
- Community Foundation Virtual Visit #1: Omaha Community Foundation
 - Melisa Sunde, Chief Financial Officer
 - Highlighted Resources:
 - [Resources for Professional Advisors](#)
 - [Omaha Venture Group](#)
 - [Community Investment Strategy](#)
 - [Impact Investing](#)
- Community Foundation Virtual Visit #2: Foundation for the Carolinas
 - Alyssa Federico, Vice President of Finance
 - Highlighted Resources:
 - [Resources for Professional Advisors](#)
 - [Tools for Donors](#)—includes forms and fees
 - [Investment Resources](#)—includes strategy overview, staffing and governance, and description of available investment pools
 - [Ways to Give](#)—resources for donating complex assets

ENDNOTES

1 Next Generation Donors encompass Generation X, Millennials, and (to a lesser extent) Generation Z

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3 Advisors counseled that the Foundation's Investment Committee has debated the merit of an ESG offering but are not yet clear that it's an enduring demand, or if income generation remains the primary charge.