

# STRATEGIC PLAN 2014–2018

Leadership and Legacy

Inspiring Philanthropy

Serving Donors

Strengthening Communities—  
Now and For  
Future Generations

# POSITIONING THE GREATER MILWAUKEE FOUNDATION FOR A SECOND CENTURY



The Greater Milwaukee Foundation has a long and stellar reputation for bringing together the philanthropic vision and resources of its donors and community partners with the complex and changing needs of our communities. Generous and visionary Milwaukee community members believed in the power of philanthropy to change the lives of people in need. Over the years, the Foundation has earned the loyalty, commitment and generosity of its donors who love Milwaukee and its surrounding communities.

Our founders looked to the future with passion, imagination and wisdom. They paved the way for a permanent pool of charitable resources to address the community's most pressing needs. This innovative approach has guided the Foundation over the course of nearly a century and has helped people make the most of their charitable giving. With this strong history, the Foundation is uniquely positioned to engage and mobilize a wide range of community and philanthropic partners. By joining together, we can be a catalyst for positive change.

As the Greater Milwaukee Foundation positions itself for the next 100 years of service, it is critical that we use all of our resources—financial and human—as well as our knowledge, expertise, influence and relationships to pursue the health and vibrancy of the region we were founded to serve. We are committed to our fundamental roles of serving donors, providing strong investment results, building permanent charitable assets and funding a range of community organizations and programs. The Foundation is powerfully positioned to join with its many community partners to make a measurable impact on our region's most critical issues and help create the vibrant future we envision.

**The Greater Milwaukee Foundation believes that all voices are vital to our region's future. We promote equity and embrace the diversity of individuals, ideas and expressions.**



# RELATIONSHIPS



We are committed to providing exceptional service to donors by helping them identify and achieve their charitable goals. Our distinctive value is providing advice about charitable giving, helping donors create personal and family legacies and finding opportunities to collaborate when we identify common interests. Together, we will build mutually rewarding relationships with our charitable partners by:

## **Serving Donors**

Engage our donors' ideas, expertise and experience and help them to manage their charitable resources. Offer expanded opportunities for meaningful connections with one another and understanding of community issues to maximize the impact of their giving.

## **Expanding Partnerships**

Develop effective strategies among our vast network of donors, nonprofit organizations and community leaders to mobilize resources to strengthen communities and address persistent challenges. Invest in partnerships to leverage additional resources to achieve positive community change.

## **Growing and Preserving Assets**

Accelerate growth of assets over the next decade to increase community impact. Preserve and build upon charitable resources to benefit future generations.

## **Celebrating Our Centennial**

Celebrate our centennial and position the Greater Milwaukee Foundation for the next century. Commemorate our rich history and build a larger community endowment that creates a strong foundation for the next century.

**We are committed to providing exceptional service to donors by helping them achieve their charitable goals.**



# COMMUNITY IMPACT



We will support innovative ideas and seek out partners who can make the greatest impact.

Leadership matters. As a leader, partner and grantmaker, we will help to create positive change in our community, ensuring everyone has the opportunity to build a strong and stable future. We believe that bringing together a diverse group of individuals allows us to collectively and more effectively address the issues that face our communities. Our partnerships, strategies and investments will reflect these values as we work together to achieve greater social, economic and racial equity and create a vibrant region by:

## Expanding Community Leadership

Advance the Greater Milwaukee Foundation's leadership role by involving donors, investing strategically and increasing the engagement of a broad cross section of community voices and institutions to address the following key community issues:

### ***Strengthen Education***

- Expand quality early childhood education
- Ensure academic success and high school graduation
- Support postsecondary education access and career readiness
- Expand children's access to health, social and emotional supports

### ***Increase Regional Vitality***

- Support a thriving and diverse arts and culture community
- Protect and conserve the natural environment
- Promote the economic vitality of the Greater Milwaukee region
- Strengthen the capacity of the nonprofit sector

### ***Accelerate Neighborhood and Economic Development***

- Strengthen physical, economic and social vitality
- Enhance quality of life and social connections
- Build neighborhood capacity through resident engagement and leadership
- Promote individual economic security
- Increase opportunities for gainful employment
- Help meet the basic needs of individuals and families
- Improve access to primary medical and specialty care

### ***Promote Equity and Inclusion***

- Promote a diverse and inclusive community
- Encourage civic participation by all
- Reduce social and economic disparities based on race

## Measuring Outcomes

As a community foundation, we are committed to sharing the impact of our grantmaking with the community.



# ORGANIZATIONAL EXCELLENCE



We will work to achieve operational excellence through exceptional performance, responsible stewardship and continuous innovation and improvement.



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## **Ensuring Financial Strength**

Ensure the continued financial growth and investment management strength of the Foundation with proper oversight and planning for future growth opportunities.

## **Sustaining Strong Governance**

Continue to recruit the most talented and diverse leaders from our community to assist in critical governance oversight, asset development, investment performance, organizational effectiveness, strategy and community leadership.

## **Increasing Operational Effectiveness**

Strengthen the organization by building a high-performing culture and by upgrading systems to support the future of the Foundation. Integrate our values throughout the organization and promote diversity and inclusion. Invest in our employees with improved technology, training and career development. Commit to transparency in our operations. Promote continuous learning where staff and constituents share ideas, information and opportunities.

## **Communicating Effectively**

Deliver timely, informative and relevant communication to all stakeholders about current community needs and organizations. Promote philanthropy as an effective strategy for shaping the community that we serve.

# OUR MISSION, VISION AND VALUES



## Our Mission

Inspiring philanthropy, serving donors, strengthening communities now and for future generations.

## Our Vision

Greater Milwaukee becomes a vibrant, economically thriving region comprised of welcoming and inclusive communities that provide opportunity, prosperity and a high quality of life for all.



## Our Values

We are committed to the following values as central to our success.

### Integrity

This is at the heart of all we do. We demonstrate integrity through honesty, civility and respect. We respect each other and take pride in our work.

### Service

We provide exemplary service, nurturing relationships for generations and honoring commitments. We hold ourselves to the highest standards of ethics, accountability and fiduciary responsibility.

### Effectiveness

We partner with our extensive network of donors, nonprofit organizations and community leaders, developing effective strategies and mobilizing resources to strengthen communities and address persistent challenges.

### Inclusion

We believe that all voices are vital to our region's future. We promote equity and embrace the diversity of individuals, ideas and expressions. We are committed to learning from our partners and leading by example.

## Our Commitment

The Greater Milwaukee Foundation is committed to our fundamental roles of helping donors create personal legacies, investing donor funds for maximum returns with minimum risk, and playing a leadership role in tackling our communities' most challenging needs.

[www.greatermilwaukeefoundation.org](http://www.greatermilwaukeefoundation.org)

GREATER MILWAUKEE  
FOUNDATION

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*Join our community*



Confirmed in compliance with National Standards for U.S. Community Foundations