STRATEGIC PLAN ROADSHOW

01.13.2020

George Memorial Library / Richmond
AGENDA

- Welcome & Overview - Roger Adamson, CEO
- Community Needs Assessment - Quynh-Anh McMahan, Senior Program Officer
- Activity - Ammie Blahuta, Director of Special Programs
- Strategic Plan / Grantmaking - Quynh-Anh McMahan
- Strategic Plan / Special Programs - Ammie Blahuta
- Q & A
- Understanding Houston - Diana Zarzuelo, Greater Houston Community Foundation
- Closing - Roger Adamson
POP QUIZ!

TEXT TO JOIN:

1. Type “22333” in phone number line
2. Type “ammieblahuta900” in message field
3. Hit send
What was the population of Fort Bend County in 1945?
According to the 2010 Census, which Fort Bend County city had a population ABOVE 1,000 residents?

Kenleton
Arcola
Fulshear
Pleak
What was the purchase price of the 7,500 acres from the Kempner Family to Gerald Hines to develop First Colony in 1976?

A. $2,000 per acre
B. $10,000 per acre
C. $7,500 per acre
D. $4,000 per acre
FOUNDATION HISTORY

- Established in 1945 by Albert & Mamie George
- “For the benefit of the people of Fort Bend County”
- Evolved from tremendous prosperity and tragedy
- First gift to build Polly Ryon Hospital
- Fully funded after Mamie’s passing in 1971
- Farming & ranching legacy
THE GEORGE RANCH HISTORICAL PARK

- Also completed a year-long strategic planning process
- Focus on school groups Tues-Friday and open to the public on Saturday
- FREE admission for all Fort Bend County school groups in Fall of 2020
- New Job Opportunity: Site Director
- George Foundation employee who will lead the pursuit of the park’s new vision in partnership with the Fort Bend History Association
THE FOUNDATION TODAY

- 20-person team (10 at Morton Street + 10 at the Ranch)
- Five-member Board of Trustees who serve 10-year terms
- Exclusively place-based support for Fort Bend County

**Mission:** Partner with the community to leverage the Foundation’s resources to positively impact Fort Bend County and its residents

- ~130 active grants at any time
- >$200M in grants since inception
2015 ASSET STACK & REQUIRED DISTRIBUTION

Investment Portfolio

Real Estate

Oil & Gas

2015

$312M

Annual Charitable Distribution Requirement

$15.6M

Total Assets

5%

- Grants
- Scholarships
- George Ranch Historical Park
- Grant related admin

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- Scholarships
- George Ranch Historical Park
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2020 ASSET STACK & REQUIRED DISTRIBUTION

Investment Portfolio

Real Estate

Oil & Gas

2020

Total Assets

$430M

Annual Charitable Distribution Requirement

5%

$21.5M

- Grants
- Scholarships
- George Ranch Historical Park
- Grant related admin
FIVE-YEAR STRATEGIC PLAN

**Vision:** A thriving nonprofit sector that addresses critical community needs, enhances the quality of life, and provides opportunities for Fort Bend County residents.

- Increased distribution creates BIGGER opportunities
- Recently completed year-long strategic planning process
- “Traditional Grantmaking” + Transformational New Investments
- Identifying transformative investments will require significant input and collaboration among stakeholders
COMMUNITY NEEDS ASSESSMENT

EMAIL SURVEY on community assets and needs & NPO capacity:
• 103 (85%) responded, 87 (73%) complete
• Representation from every funding area

FOCUS GROUPS to more deeply understand needs and assets that were identified in the survey:
• 5 focus groups around top needs identified in the survey
• 35 NPO leaders and Board members participated
KEY FINDINGS: THEMES

GREAT STRENGTHS
- Strong sense of community pride
- Many assets in the community
- Dramatic growth impacting community

GREAT NEEDS
- Focus on families
- Navigation services
- Better coordination among agencies
### KEY FINDINGS: MOST URGENT NEEDS

<table>
<thead>
<tr>
<th>Needed Service</th>
<th>% ranking as Urgent</th>
<th>% ranking as Urgent or Affecting Many</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental health services</td>
<td>35%</td>
<td>78%</td>
</tr>
<tr>
<td>Financial education</td>
<td>9%</td>
<td>70%</td>
</tr>
<tr>
<td>Public transportation</td>
<td>29%</td>
<td>67%</td>
</tr>
<tr>
<td>Parenting education</td>
<td>16%</td>
<td>65%</td>
</tr>
<tr>
<td>Services to special populations</td>
<td>19%</td>
<td>65%</td>
</tr>
<tr>
<td>Legal assistance</td>
<td>13%</td>
<td>63%</td>
</tr>
<tr>
<td>Addiction prevention</td>
<td>18%</td>
<td>63%</td>
</tr>
<tr>
<td>Healthcare for indigent</td>
<td>18%</td>
<td>63%</td>
</tr>
<tr>
<td>Reliable transportation</td>
<td>17%</td>
<td>62%</td>
</tr>
<tr>
<td>Youth mentor program</td>
<td>17%</td>
<td>60%</td>
</tr>
<tr>
<td>Affordable housing</td>
<td>23%</td>
<td>58%</td>
</tr>
</tbody>
</table>
KEY FINDINGS: URGENT NEEDS BY ISSUE AREA

**HEALTH**
- Mental Health Services: 78%
  - Need is Urgent: 67%
  - Affects Many: 60%
  - Affects Few: 65%
  - Need is Met: 78%

**SERVICES TO YOUTH**
- Youth Mentor Program: 60%
  - Need is Urgent: 67%
  - Affects Many: 60%
  - Affects Few: 65%
  - Need is Met: 78%

**COMMUNITY INFRASTRUCTURE**
- Public Transportation: 67%
  - Need is Urgent: 67%
  - Affects Many: 60%
  - Affects Few: 65%
  - Need is Met: 78%

**FAMILY SERVICES**
- Parenting Education: 65%
  - Need is Urgent: 67%
  - Affects Many: 60%
  - Affects Few: 65%
  - Need is Met: 78%
KEY FINDINGS: NONPROFIT SECTOR CAPACITY

Ability to inspire, prioritize, make decisions, provide direction, innovate

<table>
<thead>
<tr>
<th>Leadership Capacity</th>
<th>Strength</th>
<th>Working on it</th>
<th>Needs support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community support</td>
<td>50%</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Financial health</td>
<td>50%</td>
<td>38%</td>
<td>13%</td>
</tr>
<tr>
<td>Mission-related advocacy</td>
<td>53%</td>
<td>26%</td>
<td>12%</td>
</tr>
<tr>
<td>Board composition</td>
<td>49%</td>
<td>39%</td>
<td>11%</td>
</tr>
<tr>
<td>Board Commitment</td>
<td>59%</td>
<td>31%</td>
<td>9%</td>
</tr>
<tr>
<td>Clear organizational goals</td>
<td>66%</td>
<td>26%</td>
<td>8%</td>
</tr>
</tbody>
</table>
KEY FINDINGS: NONPROFIT SECTOR CAPACITY

Ability to ensure effective and efficient use of organizational resources

<table>
<thead>
<tr>
<th>Management Capacity</th>
<th>Strength</th>
<th>Working on it</th>
<th>Needs support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteer management</td>
<td>36%</td>
<td>46%</td>
<td>13%</td>
</tr>
<tr>
<td>Staff development</td>
<td>44%</td>
<td>40%</td>
<td>12%</td>
</tr>
<tr>
<td>Monitoring goals/performance targets</td>
<td>56%</td>
<td>34%</td>
<td>10%</td>
</tr>
<tr>
<td>Staff levels and capacity</td>
<td>53%</td>
<td>37%</td>
<td>9%</td>
</tr>
<tr>
<td>Effective program planning/budgeting</td>
<td>62%</td>
<td>34%</td>
<td>4%</td>
</tr>
<tr>
<td>Implementing best practices</td>
<td>64%</td>
<td>34%</td>
<td>3%</td>
</tr>
<tr>
<td>Effective/efficient organizational processes</td>
<td>58%</td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Experienced senior management team</td>
<td>77%</td>
<td>19%</td>
<td>1%</td>
</tr>
</tbody>
</table>
KEY FINDINGS: NONPROFIT SECTOR CAPACITY

Ability to monitor, assess, respond to internal and external changes

<table>
<thead>
<tr>
<th>Adaptive Capacity</th>
<th>Strength</th>
<th>Working on it</th>
<th>Needs support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robust partnerships to enhance services</td>
<td>41%</td>
<td>49%</td>
<td>10%</td>
</tr>
<tr>
<td>New program development</td>
<td>44%</td>
<td>40%</td>
<td>12%</td>
</tr>
<tr>
<td>Program growth</td>
<td>50%</td>
<td>39%</td>
<td>11%</td>
</tr>
<tr>
<td>Organizational learning</td>
<td>43%</td>
<td>50%</td>
<td>7%</td>
</tr>
<tr>
<td>Performance measurement</td>
<td>42%</td>
<td>49%</td>
<td>9%</td>
</tr>
<tr>
<td>Strategic Planning</td>
<td>39%</td>
<td>52%</td>
<td>9%</td>
</tr>
<tr>
<td>Use of beneficiary feedback loops</td>
<td>35%</td>
<td>42%</td>
<td>17%</td>
</tr>
<tr>
<td>Use data to support program planning</td>
<td>39%</td>
<td>48%</td>
<td>13%</td>
</tr>
<tr>
<td>Monitoring community needs</td>
<td>42%</td>
<td>46%</td>
<td>11%</td>
</tr>
</tbody>
</table>
KEY FINDINGS: NONPROFIT SECTOR CAPACITY

Ability to implement key organizational and programmatic functions

![Operational Capacity Chart]

- Database and reporting systems: 23% Strength, 58% Working on it, 18% Needs support
- Staff equipped and trained on database and reporting systems: 29% Strength, 52% Working on it, 17% Needs support
- Facility Capacity: 41% Strength, 34% Working on it, 15% Needs support
- Onboarding and training of staff: 39% Strength, 42% Working on it, 13% Needs support
- Facility Condition: 49% Strength, 26% Working on it, 12% Needs support
- Location of facilities: 66% Strength, 12% Working on it, 11% Needs support
- Communication with Stakeholders: 42% Strength, 51% Working on it, 5% Needs support
ACTIVITY

If money were not a barrier, what big idea do you have for enhancing life in Fort Bend County?

Write down your answer on one of the post-it notes and put around the room. You can share more than one idea!
We understand our community’s challenges are complex and will require collaborative solutions.

We work to ensure the well-being of all Fort Bend children and families.

We strive to improve access to critical health, education and social services.

We encourage a comprehensive approach to serve those with complex needs.

We invest in transformational opportunities through innovations born from local stakeholder input.

We seek to support and leverage the diverse community that is Fort Bend County.

We recognize nonprofits as critical to the well-being of our community and support their development, particularly by investing in human capital and leadership.

We aim to deliver impact and continuous improvement through data and learning.

We promote philanthropy in all stages of life and encourage others to join in this endeavor.
GOALS

Goal 1: Maximize the increased charitable distribution requirement by delivering a diversified portfolio of programs to achieve impact.

By the end of 2024, the Foundation will have increased charitable distributions by 45%.
GOALS

**Goal 2:** Engage stakeholders in an iterative process to develop **collaborative cross-sector solutions** to address 1-2 critical community issues.

Culture of **experimentation** & **learning** to ensure space for **innovation & risk-taking**
GOALS

Goal 3: Support a best-in-class nonprofit sector to serve Fort Bend Co. and its residents by expanding technical assistance, capacity building, and leadership development opportunities.

Multi-pronged approach:
- Small grants to support capacity building.
- Community-wide learning sessions.
- Expansion of offerings for Excellence for Nonprofit Leadership alumni.

Goal 4: Increase impact on local students through Foundation Special Programs.

Goal 5: Continue efforts to measure impact and engage in continuous quality improvement and learning.
STRATEGY FRAMEWORK

KEY THEMES

» Ensuring the well-being of all Fort Bend CHILDREN & FAMILIES
» Pursuing IMPACT through data and learning
» Encouraging comprehensive approaches to serving those with COMPLEX NEEDS
» Supporting efforts that demonstrate a LEVERAGE opportunity
» Improving ACCESS to critical health, education & social services and across systems
» Striving for EFFICIENCY to the benefit of our grantees
» Engaging our DIVERSE community in pursuing the mission

• Education
  • Priorities: Early Childhood, High Performing Public Education, Career Readiness

• Health
  • Priorities: Access to Care for Uninsured, Behavioral Health

• Human Needs
  • Priorities: Affordable Housing, Youth Development

• Community Enhancement

GRANTMAKING

SPECIAL PROGRAMS

• Scholarships
  • Youth In Philanthropy
  • Excellence for Nonprofit Leadership
  • George Ranch Historical Park

• Texas State Technical College FBC

INITIATIVES

• Nonprofit Sector Capacity Building & Leadership Development
• Other Initiatives TBD
GRANT OPPORTUNITIES

EDUCATION
• Priority areas of funding for Education include Career Readiness, Early Childhood and High Performing Public Education Models.

HEALTH
• Priority areas of funding for Health include Access to Care for Uninsured and Behavioral Health.

HUMAN NEEDS
• Priority areas of funding for Affordable Housing and Youth Development.

COMMUNITY ENHANCEMENT
• Majority of the Foundation’s grants support Education, Health and Human Needs efforts, with a smaller portion awarded to Community Enhancement.
GRANT OPPORTUNITIES

TYPES OF REQUESTS: General Operating Grants, Program Grants, Project Grants
• Capital Project Grants are awarded on a very selective basis

APPLICATION PROCESS: Letter of Inquiry (LOI) required
• Small Grant Application (for requests of $25,000 & under)
• Operating Grant Application (for requests over $25,000)
• Program/Project Grant Application (for requests over $25,000)

DEADLINES: November 1-October 31 each year and will be considered on a rolling basis
GRANT OPPORTUNITIES

STEPS

1. Review our website
2. Contact Grant Staff with questions
3. Log into online portal
CAPACITY BUILDING OPPORTUNITIES

The George Foundation is committed to provide unique opportunities to continue the development of grantees, community leaders and foundation partners who serve Fort Bend County and its residents. Possible topics:

- Leadership Development
- Crisis Management
- Financial Trends
- Succession Planning
- Social Media Marketing
- Fundraising Strategies
- Lean Operations Management
SPECIAL PROGRAMS

YOUTH IN PHILANTHROPY
- Shaping the leaders of tomorrow by energizing students to serve their community today.
- 200 Juniors and Seniors from across Fort Bend County (24 different high schools)
- Partnering with 32 Nonprofits who support the Fort Bend County community

EXCELLENCE FOR NONPROFIT LEADERSHIP
- Eight session course designed to enhance the knowledge and skill set of senior staff, board members and engaged community members leader nonprofit organizations.
- Centered around five major tops focusing on Workforce, Governance & Leadership, Organizational Audit, Strategic Planning and Fund-Development
SCHOLARSHIP PROGRAM

$1.3 million in total annual awards to Fort Bend County students

- (40) $24,000 Scholarships earmarked for graduating High School Seniors
- (130) $18,000 Scholarships awarded to students enrolled or planning to enroll into Higher Education
- Scholarships may be used at any public institution of higher education in Texas
  - Two-year college, four-year college, university, or technical school
- Single on-line application process for both opportunities

- Eligibility Requirements
  - Resident of Fort Bend County
  - Enrolled (or plan to) as full-time student
  - GPA of 2.5 or higher
  - US citizen, US permanent resident, or DACA status

Award Considerations

- Academic Achievement
- Community Involvement
- Extra Curricular Activities
- Leadership
- Special Circumstances
- Demonstrated Financial Need