

# MISSION

*To improve the quality of life in Berkshire, Columbia, Dutchess and Litchfield counties through organized philanthropy.*

## VALUES

Responsiveness  
Accessibility  
Flexibility  
Honesty  
Accuracy  
Discretion  
Trustworthiness  
High performance standards  
Accountability

## MANDATE

Proactive catalyst for positive community action  
  
Be the strongest, most proactive, positive force for philanthropy in the region

## PRINCIPLES

Committed to non partisan activism  
A believer in coalition  
Comfortable with ambiguity  
Grounded in our region  
Here for the long haul  
Operate leanly to devote maximum resources for the community

## IMAGE

Adds value  
Excellent  
Reliable  
Responsive service  
Flexible  
Innovative  
Imaginative  
Facilitates giving  
Promotes alliances  
Professional  
Leverage Philanthropy

# GOALS

## GROW ASSETS

- Increase number of donors advisors
- Increase number of endowed funds\*
- Top quartile investment performance\*
- Aggressive fundraising where appropriate
- Increase nonprofit endowments under management
- Be receptive but selective to CI's
- Increase awareness of planned giving

## GIVE STRATEGICALLY & RESPONSIVELY

- Maintain a portfolio of funding strategies:
  - Area funds \*
  - Educational Enrichment\*
  - General fund
  - Technical assistance fund
  - Emergency grants
  - Field of interest funds
- Be alert to hopes and needs of the region

## CULTIVATE PHILANTHROPIC RELATIONSHIPS

- Accelerate marketing and public relations
- Expand outreach to financial advisors
- Increase comprehensiveness of relationships with current donors
- Conduct regular technical assistance workshops with nonprofits
- Position the Foundation as a knowledgeable and cooperative community partner

## BUILD SUSTAINABLE CAPACITY\*

- Restructure the fees charged\*
- Encourage endowments\*
- Practice fiscal discipline\*
- Build operating endowment

## MAINTAIN A HIGH LEVEL OF PROFESSIONAL SERVICE

- Stay abreast of all professional information
- Maintain the current level of staff responsiveness