



**Philanthropy**  
miami

# Strategic Plan

# What's next?

This is a question we've been pondering for the past several years.

These days, accentuated by a global pandemic, it's a question that is on everyone's minds. As we all emerge from a turbulent and uncertain year, a year when we were forced to accept, adapt, and pivot, we at PhilanthropyMiami courageously delved into what has become an existential question.

## What's next?

Within these pages, we endeavor to articulate our answers to this question. We've undertaken a process of reflection and investigation. Who do we serve? Who do we want to serve? How do we best accomplish that? What does success look like?

As PhilanthropyMiami celebrates 25 years, one might think that finding the answers should be easy. But they're not. We've got many opportunities ahead but reaching our full potential will take considerable effort.

But it is worth the effort. Our community, our nonprofit organizations, and the people who call Miami-Dade home all deserve our very best.

As we move forward, we do so with alacrity, enthusiasm, and humility.

We are the conveners of the nonprofit sector in Miami-Dade County. But, we don't have all the answers. This is why we need you. As you examine the challenges and solutions presented in this document, we ask you to consider your own question: "How can I be involved?"

**PhilanthropyMiami is the place where you belong. Please...join us.**

Michael Rosenberg & Glenn Kaufhold  
Co-Chairs, Board of Directors  
April 2021

The logo for Philanthropy Miami, featuring the word "Philanthropy" in a large, bold, white sans-serif font above the word "miami" in a smaller, lowercase, white sans-serif font. The text is set against a black rectangular background that has a diagonal cut-off at the bottom right corner.

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# This is 25.

Powered by a 25-year legacy, PhilanthropyMiami has a renewed clarity of purpose and energy as the conveners and curators of and for Miami's nonprofit community.

Our goal is to increase the ability of organizations and individuals to drive social change by creating elevating experiences for collaboration, learning, and networking that enhance our sense of community. We're striving to maintain a thriving community of professionals, volunteers, and organizations working together toward a greater Miami.

unity by helping  
or one another.  
OUR MISSION





# The Values That Drive Us

## Collaboration

We view ourselves as the conveners and advocates – not the leaders – of the nonprofit sector in Miami-Dade County. It is incumbent upon us to collaborate with other nonprofit, for-profit, and government entities with shared goals of improving our community.

## Accessibility

While we serve the entire sector, we are committed to making our programs accessible to smaller, community-based organizations. This includes maintaining our free **Innovators** webinar series, and offering scholarships, as available, to our **PhilanthropyMiami Academy** courses and **Ignite!** conferences.

## Diversity, Equity, Inclusion, and Belonging

In the design, planning, and execution of all that we do, we will tap the rich diversity – in all its forms – of our local and national communities. Our goal is for every person and every organization in the nonprofit sector to find in **PhilanthropyMiami** a place where they can belong.

## Innovation and Thought Leadership

We deliver on our promise by infusing forward-looking innovation, excellence, creativity, and thought leadership into every program and service offering, so that every person walks away confident that they received something of value.

## Impact

Measuring social impact is increasingly expected by donors and funders. We will measure the impact of all our programs and services and use data in our decision making and our collaborations with other organizations.





# The Plan

Our work over the next three years will be built around six core pillars.

1. Positioning Ourselves Within the Community
2. Serving Nonprofit Executive Directors and Chief Executive Officers
3. Convening Local Funders
4. Building Capacity Through Our Programming
5. Creating a Sustainable Infrastructure
6. Strengthening Board Leadership and Diversity

# 1: Positioning Ourselves

By adopting a vision of “maintain a thriving community of professionals, volunteers, and organizations working toward a greater Miami,” we have cast ourselves as the conveners of Miami’s nonprofit community.

PhilanthropyMiami is uniquely qualified to do this, given our sustainability (24 years) and reputation for quality programming. We are viewed as neutral players in the ecosystem without an agenda other than what is articulated in our mission and vision.

This was exemplified by our leadership position in the creation and distribution of the 2020 Economic Impact Study, in partnership with a variety of funding partners, the Greater Miami Chamber of Commerce, and the FIU Metropolitan Center.

## KEY PRIORITIES

- **Convening of nonprofit CEOs.** A pillar of this plan is to create programming that builds community among the executive directors and nonprofits of Miami’s nonprofit CEOs (see goal two of this plan).
- **Convening of funders.** There is consensus agreement that the merger of the former Miami-based Donors Forum into the Florida Philanthropic Network, left a vacuum in the environment. Local funders have identified a need for local collaboration, and view PhilanthropyMiami as a logical convener (see goal three of this plan).
- **Powering positive change through impact reporting.** This 12-month pilot project will build the capacity of eight to 10 grantees to measure their impact and tell their own stories of impact. The project is supported by a coalition of community partners and in collaboration with the Data for Good Fund and UpMetrics.
- **Partner collaborations.** We are seeking partnerships with funding entities that go beyond sponsorship. Instead, we want to partner with corporations and foundations to assist them with their own community-related goals.





## 2: Serving Nonprofit Executives

We have long identified nonprofit chief executives as part of our core audience. The intent of this goal is to curate the content most of use to this audience.

Through email and telephone interviews with a diverse range of executives from throughout the community, we learned that the stress that permeates the environment – the COVID-19 pandemic and its resulting economic challenges, racial justice issues, and political polarization – has pressured nonprofit leaders. It has brought to the fore topics such as leading in a crisis and building culture in a virtual world.

### KEY PRIORITIES

- **Create more engagement and sharing of fundraising expertise from across the country.** CEOs indicated fundraising represented both their biggest challenge and area of most needed support. We will integrate this need through all of our programming.
- **Provide support for volunteer engagement and board development.** The need for skills-based volunteering and marshalling board resources were frequently identified in the survey. We will develop and/or modify programming to tackle this.
- **Increase the diversity of speakers.** Respondents told us that program leaders should mirror community diversity. We are creating a standing work group to identify new voices to participate in creating and delivering content.
- **Increased coverage of crisis management and human resources in our programming.** Our research indicated these as subjects that are top of mind. We will include these topics in our Deep Dive series and at the Ignite! conference.

## 3: Convening Local Funders

As part of our planning process, a dedicated work group conducted considerable scanning into the needs of local funders, who have always been welcomed at of PhilanthropyMiami programming. But we wanted to know what this audience needs.

The research revealed an opportunity for us to be the convener of the funding community with the ability to provide excellence and a safe space. Funders are seeking a go-to place for coordination during community emergencies and collaboration for greater impact.

### KEY PRIORITIES

- **Survey.** We will launch a survey for funders to assess their needs and wishes.
- **Convene roundtables.** Bring together a series of groups in roundtable events for individual donors and family foundations, corporate funders, and foundations and public charities.
- **Convene group to discuss current environment and the future.** The funders could discuss the current environment and identify next steps for our community. The group would have a community-wide organized approach, to be a clearing house for actions taken, collect data and share with the community.
- **Funding.** National experts in the field tell us that the most effective networks of funders have major backing (initial and ongoing) from the largest funders in the region. We will develop a dedicated funding stream to ensure the sustainability of this initiative.







## 4: Building Capacity

PhilanthropyMiami enjoys a 25-year reputation for delivering quality programming. We intend to retain and grow that reputation through existing programs as well as new ideas for bringing people together.

The COVID-19 pandemic changed the delivery of programming, for sure, and it is unclear what the future will bring. Presumably, by the fall of 2021, people will feel comfortable returning to in-person events. But we believe that digital strategies are here to stay, and that they need to be refined and integrated into most or all of what we do.

### KEY PRIORITIES

- **Donor Next Door.** This legacy event remains a pillar of our annual programming. It is an excellent and affordable opportunity for nonprofits to recognize their donors during a high-profile event. It is also the organization's strongest networker, especially given the community and business leaders often in attendance. We will explore how we can build upon this framework for greater impact through technology, and expanded corporate and media partnerships.
- **Ignite! The Collision of Ideas and Impact.** Our annual convening of the sector in a conference setting, is consistently well received and a driver of earned revenue. In 2020, the conference was presented in a virtual setting, which enabled us to attract national voices. It did not, however, serve as a revenue generator. We will explore the continued use of technology to expand participation.
- **Innovators.** This series began in 2018 in partnership with the Venture Café and was, at the time, offered five or six times per year. Programs were free of charge, and represented an effort to increase accessibility. Innovators was reimaged during the pandemic as a webinar series, starting in April 2020. More than 2,000 people accessed our content during 2020 alone. We will continue Innovators as a monthly webinar indefinitely with free access for all.



- **PhilanthropyMiami Academy.** The strategic initiative was designed to be a catalog of multi-part courses. It launched in January 2020 with **Fundraising Fundamentals**, a 16-hour intensive experience for those new to the fundraising profession or for chief executives who desire fundraising training. As of spring 2021, nearly 100 people participated in Fundamentals.

With the impact potential of the Academy we will create addition offerings including major gifts, planned giving, board leadership and governance, branding/marketing, and others.

- **Breakfast Club** (working name). The vision for this planned program would be to provide a casual monthly venue for a lightly facilitated conversation, with the ultimate goal of relationship building among nonprofit professionals.

## 5: Creating an Infrastructure

We took a good, hard look in the mirror to evaluate our ability to live up to our renewed mission and vision. Our analysis revealed a number of core strengths: longevity; a board committed to a renewed sense of vision and purpose; our longstanding relationship with Chase Marketing as our administer, and a strong reputation for excellence.

However, there are historic challenges: stability of financing and cash flow; lack of a fundraising infrastructure; lack of financial and human resources necessary for brand promotion, content development, and marketing; insufficient IT and data resources for decision making, and the lack of human capital to effectuate new ideas and programming.

### KEY PRIORITIES

- **Attract seed funding to immediately scale the organization.** Approximately \$1 million will be required over the next three years to make the necessary investments to implement this strategic plan.
- **Create a sustainable financial model.** Concurrent with seed funding will be the need for a business plan that allows us to sustain the ongoing work of PhilanthropyMiami.
- **Hire staff.** We will hire our first executive director, and program director for the work with funders, and a content/marketing professional to augment the services provided by Chase Marketing.
- **Create a home.** We will begin searching for a physical location to serve as a central gathering place for trainings, meetings, and networking events.
- **Invest in technology.** We will put a CRM system in place to track constituent engagement and provide the necessary data to demonstrate impact and make responsible decisions. We will also invest in a web-based board management portal to streamline operations.





## 6: Board Leadership and Diversity

Even with additional staff, the Board of Directors will continue to play a very active role in guiding the growth and development of the organization. And that board must, in every way, reflect the rich diversity of the community we serve.

We take that commitment seriously, beginning with the acknowledgement that we are not there. While we have gender balance, we fall short in other forms of diversity – cultural/racial, representation from our key audiences, including CEOs and philanthropists.

### KEY PRIORITIES

- **Reimagine leadership structure.** The current board structure should be reviewed with the following lenses: optimal size; willingness to take leadership roles in the activation of this strategic plan; ability to raise funds on behalf of the organization; representation of key audiences (CEOs, funders, nonprofit professionals)
- **Improve diversity.** As the convener of the nonprofit community, the Board of Directors must reflect Miami's vibrant diversity. The current board should determine how that reflection is defined and be willing to make difficult decisions to achieve this goal. This is one of our highest priorities.
- **Expand involvement.** We will create advisory committees in the design and execution of all of our programs to ensure a diversity of ideas and representation of the entire community, as well as building a pipeline for future board leadership.

## We are a work in progress.

At PhilanthropyMiami, nothing is static. We remain curious about new ideas and new thinking, and how we bring that home.

PhilanthropyMiami is where you belong. As we meet new people and we engage diverse voices, we evolve our thinking. We welcome your ideas, your creativity, and your energy. We welcome you as advisor, speaker, advocate, funder.

**Ask questions. Challenge us. Get involved.**

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