



INSIGHTS NEWSLETTER | A QUARTERLY RESOURCE FROM THE ROME GROUP

CEO Message

"I was actually sad when it ended."

Perhaps you said this at the end of your strategic planning process too! Perhaps, like me, you really enjoy strategic planning: The laser focus on measurable goals that will advance an organization's mission, the board and staff building a shared vision of the future, and who doesn't love sticky notes? A well-facilitated process leads to a solid strategic plan and a sense of accomplishment, even sadness, when it concludes. But board approval is not the end of the process.

It's the beginning...



Dayna M. Stock, Ph.D.
The Rome Group CEO

A solid strategic plan is a roadmap. It sets an organization on a course and provides a set of specific directions for the first 500 miles. Like a good road trip, a strategic plan requires frequent stops – opportunities to refuel, recharge, and sometimes, take in the view. Yes, you can set the cruise control for a while, but unfortunately too many organizations take their hand off the wheel when the planning is done.

The new year presents a new opportunity to recommit to your strategic plan goals. If it has been more than a month since you looked at your plan, it's time to dig it out. Make sure you have a plan to implement your plan:

- **Leaders:** When you talk about your vision for the organization, frame it in the context of the most important priorities outlined in your strategic plan. Develop a dashboard to track progress toward goals and key objectives and share it with your board at least quarterly. Align individual staff goals with the plan so that everyone can see how their work contributes to the achievement of organizational priorities.
- **Board members:** Keep the strategic plan on the agenda. Align committee work with strategic goals so board and staff are driving in the same direction. Ask the executive director what resources are needed for implementation and make them a priority.

Your goals shouldn't change as much as the tactics you employ to achieve them. Dedicate time to review your plan annually, so you can set the course for the next leg of your journey. Consider a half-day board retreat annually to revisit the plan and make sure your organization is on track to achieve the goals you set. Your strategic plan is a dynamic tool for defining and measuring forward progress. Do what's necessary to keep it alive!

Strategic planning requires an up-front investment of time on the part of board and staff. Don't risk being sad because the plan was never implemented.

Featured News

Focus on Donor Retention This Year

A quality donor retention program provides your organization with a blueprint of what is working, builds strong donor relationships, promotes your cause, helps to generate larger donations, and saves your organization time and money.

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The 3 Keys to Future-Proofing Your Fundraising

The future's looking bright for fundraising: There was a 4% growth in charitable giving among U.S. charities alone in 2021, and the average annual gift total increased 10% from 2020 to 2021. But the rapidly upcoming generational shift has a lot of nonprofits looking to the future.

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How to Unlock More Gifts: New Research Says Enhancing Psychological Well-Being Is Key

A new study of wealthy donors suggests that a key way fundraisers can persuade them to give bigger is to explore how a gift will contribute to the philanthropist's psychological well-being, rather than focusing so much on the impact the gift could have on the nonprofit or a cause.

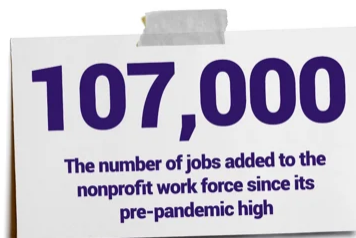
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Nonprofit Employment Has Finally Recovered From Jobs Lost to Covid

Nonprofits across the country have added enough jobs over recent months to more than make up for those lost since the onset of the Covid crisis nearly three years ago, according to new estimates from the George Mason University Nonprofit Employment Data Project.

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Schwab Charitable awarded \$4.7 billion in donor-advised grants in 2022

Schwab Charitable, the San Francisco-based provider of donor-advised funds (DAFs), facilitated grants totaling more than \$4.7 billion in 2022—a 7 percent increase from \$4.4 billion 2021.

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Giving by biggest U.S. donors jumped 35 percent in 2022, Forbes finds

The 25 biggest givers in the United States donated \$27 billion to charitable causes in 2022, an increase of 35 percent from \$20 billion in 2021, the latest annual list compiled by Forbes finds.

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YouthBridge Community Foundation Announces 2023 Grant Programs

Heritage

To honor our mission of partnering with donors around sustainability of nonprofits, YouthBridge provides grants to child or youth serving organizations that are regularly supported by our fundholders.

Think Big for Kids

The Think Big for Kids Fund provides grants designed to stimulate innovative thinking and fund big ideas from nonprofits that serve children and youth in our community.

Partnership or Merger

YouthBridge Community Foundation of Greater St. Louis has developed this grant program to assist nonprofits who are looking to, or have already found, ways to partner or merge with other nonprofits.

Capacity Building

YouthBridge has developed this grant program to assist nonprofits in building, strengthening and sustaining their organizations.

Wayne C. Kaufmann Charitable Foundation

The Wayne C. Kaufmann Charitable Foundation seeks to improve the care and welfare of people in the community so that human beings can live up to their God-given potential.

William S. Anheuser Charitable Fund

The William S. Anheuser Charitable Fund, a Donor-Advised Fund of YouthBridge Community Foundation, follows the guiding principle to Enrich, Enlighten, Encourage and Educate a few to Enable them to Pay It Forward.

Youth Entrepreneurship

The Youth Entrepreneurship Grant is designed to support youth entrepreneurship programs in the greater St. Louis Area.

YEP STL!

YEP STL! (Youth Engaged in Philanthropy) is a group of high school students passionate about helping the community and motivated to help youth of St. Louis by encouraging bright futures. We do this by reviewing applications for grant money and evaluating where we think it will be best spent.

[Learn More](#)

The Women's Foundation of Greater St. Louis 2023 Grant Cycle

The Women's Foundation is accepting applications from nonprofit organizations whose programs impact women and align with one of their funding focus areas:

- Increasing access to jobs for women and supporting women earning a living wage (currently \$47,500/year for a family of four) including workforce development/job training (with an emphasis on female-specific cohorts)
- Increasing supports for working families such as access to safe, affordable childcare; access to paid family leave; or that otherwise remove barriers to employment for women.
- Increasing family well-being and eliminating barriers to economic success for women by engaging women and their children in a 2 Generation approach (**See "What is 2Gen?" from the Aspen Institute**).

Organizations wishing to apply for a 2023 Grant should submit Letter of Intent by **March 31, 2023.**

[Learn More](#)

What We're Reading & Listening To

The Importance of Inclusive Hiring Practices
Nonprofit Hub Radio

Leadership and Self-Deception
by The Arbinger Institute

Upcoming Events

St. Louis Council of Charitable Gift Planners (SLCCGP) Planned Giving Bootcamp

Session 1: Estate and Charitable Planning for Everyone
February 16, 2023 | 8:00am - 10:00am

Too often, even sophisticated planners assume that integrating charitable planning into a client's estate plan only applies to the very wealthy. However, charitable planning can benefit everyone, and their heirs, as well. Kathleen will help you understand estate and charitable planning and how to match the right strategy and tools to the donor.

Session 2: How to Jump Start Your PG Program: A Case Study
February 23, 2023 | 8:00am - 10:00am

Using a PG Calc case study, we'll look at how to create a sustainable planned giving program that fits your organization. We'll examine the importance of your legacy society and balancing portfolio work with marketing and program management. We'll also help you leverage metrics and your database to improve and measure success.

Session 3: Meeting Buster Mayberry: A Gift Planning Conversation Lab
February 23, 2023 | 10:00am - 12:00pm

Buster Mayberry is a long-time donor to High State University, but no one really understands why he's been loyal, or what might increase his giving. During this highly interactive program, you will meet "Buster," and using clues from his donor file, you will attempt to uncover his passions and move his philanthropy to a new level.

[Register Now](#)

The People Section

If you're finding it challenging to keep up with the ever-changing roles in nonprofits, see who's where in the STL community with our brief updated list of nonprofit new hires.

Nonprofits have always inspired transformation in the communities they serve. In a space often underfunded and understaffed, nonprofits continued to thrive despite the obstacles and uncertainty since the pandemic's start.

Congratulations and best wishes to these nonprofit professionals in their new assignments.

- **Amy Dove**, Vice President, Philanthropy, St. Louis Zoo
- **Elizabeth Hickox**, Corporate Partnerships Manager, St. Louis Zoo
- **Beth Feldman**, Director of Volunteer Engagement, Washington University in St. Louis
- **Heather Kemper, MA**, Director of Development, Miriam School & Learning Center
- **Christina Cook, MSW**, Developmental Database Manager, Mary Institute and St. Louis Country Day School (MICDS)
- **Annie Nickrent**, Assistant Director of Stewardship, Arts & Sciences, Washington University in St. Louis
- **Amber Johansen, CFRE**, Major Gifts Officer, Arthritis Foundation
- **Keshia Hair, MSW**, Manager for the Center for Human Service Leadership, Delmar DivI Ne
- **Ron Glenn**, Executive Director, Center for Head Injury Services
- **Mary McMurtrey**, VP for Philanthropy, United Way of Greater St. Louis
- **Reggie D. White**, Associate Artistic Director of the Repertory Theatre of St. Louis
- **Josina P. Greene, MBA**, Director of Giving Strategies, St. Louis Community Foundation
- **Sara Paracha**, Lead Catalyst, Resource Development, Forward Through Ferguson
- **Francesca Passanise**, Executive Director, Art St. Louis
- **Breanna Parker-Gills**, Development Manager, Marian Middle School
- **Dr. Kendra Holmes**, Chief Executive Officer, Affinia Healthcare
- **Mary Pryse, MSW, LMSW**, ITCDS Supervisor, Independence Center
- **Ellen Reed**, Crisis Counselor, Illinois Coalition for Community Services
- **Kesha Kent**, Senior Director of Career Development, Rung for Women
- **Karen Lintz**, Director, Illinois Region, United Way of Greater St. Louis

Do you have news about a job opening, new hire, promotion, or other happenings? If so, **send us your news** and we'll consider including it in our next issue of Insights.

Nonprofit Job Openings

See the latest opportunities to serve your community.

OPEN JOBS

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