Strategic Priorities
2015 - 2020
Priority 1: Provide transformative thought leadership on the practice of philanthropy in the region

Establish SECF as the go-to source for research and data on Southern philanthropic trends and history

- Promote the history of Southern Philanthropy
- Conduct research on giving trends across the South
- Prepare special reports for constituency groups (family, private, community, etc.)
- Report on State of Southern Philanthropy
- Disseminate SECF member research and reports

Promote best and promising practices, lessons learned and innovations in grantmaking

- Share member approaches to effective philanthropy
- Advance governance and stewardship development for trustees & other decision-makers
- Partner with other national and regional organizations to provide knowledge and information on best practices
- Introduce members to individual thought leaders with expertise in philanthropy

Use SECF’s Annual Meeting to propel members toward continued engagement

- Reflect SECF strategic priorities throughout the Annual Meeting program
- Establish Annual Meeting as the hallmark of SECF’s leadership
- Provide access to high quality keynotes/speakers
- Highlight philanthropic success stories, failures & lessons learned
- Connect members with a diverse array of local, regional and national thought leaders
Priority 2: Serve as the premiere resource to Southern Philanthropy through collaborative services and programming

Leverage opportunities for members to collaborate with national funders

- Identify opportunities to leverage grantmaking in the South
- Strengthen relationship with national funders interested in supporting the South
- Increase visibility of Southern philanthropy and the work of our members
- Connect members with national funders

Serve as a neutral convener for members and prospects to explore areas of shared interest

- Ensure programming offers different perspectives & viewpoints for SECF’s diverse membership
- Expand convenings and other programs to various geographies across the footprint
- Build cross-sector partnerships that focus on issues and grantmaking practice areas

Design services and programs that meet and exceed the needs of current members and attract prospects

- Offer webinars, forums & programs that meet the needs of all SECF member constituencies
- Support member-driven, member-led affinity groups
- Build retention and recruitment program
- Use results of Biennial Member Survey to enhance offerings
- Offer innovative member benefits, incentives
- Expand New Member Orientation

Develop strategic partnerships that add value to programming and education for SECF members

- Foster member-to-member relationships in order to share local educational resources
- Develop relationships with academic centers, philanthropic groups & nonprofits to connect networks and customize programming
- Advance partnership agreements, MOUs and proposals that align with strategic interests
Priority 3: Leverage strengths to further cultivate the voice of Southern Philanthropy

- Reinforce the value of membership through an integrated suite of services and programming
  - Develop statement of SECF’s value proposition
  - Develop Listservs
  - Promote learning communities and programs across the region
  - Position Annual Meeting as a culmination of strategic priorities
  - Connect programs and services as packages based on issues or constituency

- Support philanthropic leadership development for grantmakers committed to the South at all career stages
  - Offer leadership development programming:
    - Hull Fellows
    - CEO/Health Legacy CEO Forum
    - Trustees
  - Provide programming for all foundation staff member
  - Develop experiences for interns & fellows at SECF
  - Support Hull & ALI alumni networks
  - Support Advanced Leadership (ALI), pending board approval

- Renew emphasis on public policy programming to empower members to defend Southern Philanthropy
  - Increase engagement and awareness of Policy in Action
  - Encourage participation with in-district meetings & Foundations on the Hill
  - Provide interactive learning tools, alerts, webinars and briefings
  - Build intelligence on state policy landscape within footprint
  - Build alliances & convene state-based policy conversations
  - Share work of members on state-based policy

- Tell the stories of Southern philanthropy to lift up connections between the philanthropic sector and key audiences
  - Identify and promote effective grantmaker and grantee relationships
  - Inform policymakers of the need for philanthropy
  - Share and promote stories that enhance the public trust in the sector
  - Encourage and promote member media outreach

- Position SECF leaders as Champions of Philanthropy throughout the South
  - Identify members who can serve as champions, thought leaders for Southern philanthropy
  - Strengthen the voice of philanthropy across the region
  - Help connect champions to local organizations and media opportunities
  - Promote individual member thought leadership
### Priority 4: Practice organizational excellence & build capacity to fulfill our mission

<table>
<thead>
<tr>
<th>Maintain and enhance financial stability</th>
<th>Adapt to changes impacting regional associations</th>
<th>Ensure continued quality governance</th>
<th>Develop robust marketing and communication practices and platforms</th>
<th>Further develop leadership culture reflective of values &amp; beliefs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review SECF’s Business/Revenue Model to ensure financial sustainability</td>
<td>Identify and implement best practices for sustainability</td>
<td>Improve trustee assessment tool &amp; opportunities for development &amp; education</td>
<td>Upgrade website platform and design</td>
<td>Integrate Statement of Intent, Beliefs &amp; assumptions, Values, and Statement of Principles into single Guiding Document</td>
</tr>
<tr>
<td>Strengthen membership recruitment and retention processes</td>
<td>Invest in research to help forecast future trends</td>
<td>Strengthen SECF board nomination process to reflect broad diversity, multi-generational leaders and member perspectives</td>
<td>Develop practices for use in leading social media platforms</td>
<td>Emphasize diversity and inclusion</td>
</tr>
<tr>
<td>Determine appropriate levels of earned revenue, sponsorships and ads</td>
<td>Use Biennial Member Survey to analyze effectiveness &amp; anticipate future opportunities</td>
<td>Build a leadership pipeline that represents all constituencies within the Southern region</td>
<td>Train staff and board on media interactions</td>
<td>Provide high-level of responsiveness and engagement with SECF members</td>
</tr>
<tr>
<td>Develop strategic grant relationships to support core operations, select programs and services</td>
<td>Conduct market analysis to determine prospective members</td>
<td></td>
<td>Explore video streaming opportunities for in-person events</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Review SECF style, branding and publications</td>
<td></td>
</tr>
</tbody>
</table>