



January 1, 2023 – December 31, 2027

Strategic Plan

The Council of New Jersey Grantmakers 2023 – 2027 Strategic Plan

Ratified and approved by CNJG Board of Trustees - June 16, 2022

Approved as 5-year strategic plan by CNJG Board of Trustees – June 27, 2024

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INTRODUCTION

The strategic planning process has been an opportunity to reimagine the future for the Council of New Jersey Grantmakers (CNJG). As a result of the strategy development process, the plan includes a renewed vision, mission, core values, goals, and strategies. The work is informed by previous efforts and current issues and trends impacting philanthropy and society.

Key among the Plan's influencing factors are the recommendations of the Council's Racial Equity Task Force. In response to the 2020 pandemic and the public murder of George Floyd, the Council established the Task Force to consider how CNJG could best help New Jersey's philanthropic community address the toll of racial inequities on its citizens.

While the Plan remains centered on the primacy of racial equity, the Plan evolved to use an inclusive definition of 'equity' that recognizes how inequities and disparities are experienced in many people's day-to-day lives. We based this decision on what we heard in conversation with the Council's members, as well as nonprofit and other external partners. Many suggested that the Plan recognize inequities and disparities experienced by people of all places, racial identities, socioeconomic backgrounds, abilities, and identities. An inclusive definition also allows for the recognition of the amplification of inequities and disparities attributable to intersectionality.

Other significant and formative influences of the Strategic Plan include the recognition and role of proximity in developing a deeper understanding of what is needed and what will work for the social good, CNJG's joint initiative with the New Jersey Center for Nonprofits, "Doing Good Better: Amplifying and Deepening Philanthropic and Nonprofit Partnerships in NJ.",¹ power building through Place-based Philanthropy², and the principles and practices of Trust-based and participatory approaches to philanthropy³. The final Plan is a distillation of what we heard and the lens through which we understood what we heard.

The 2023-2027 Strategic Plan is a roadmap for the next five years, built upon the Council's past strategic plans and learnings. Following the Plan's adoption by the Board of Trustees, the Board will identify and hire a permanent

¹ <https://www.cnjg.org/sites/default/files/resources/2021%20CNJG%20President%27s%20Report.pdf>

² <https://milkeninstitute.org/article/understanding-place-based-philanthropy>

³ https://pacscenter.stanford.edu/wp-content/uploads/2021/10/Guide_FINAL_chpt.13_8.5x11.pdf

executive director who will be responsible for executing the plan starting January 2023. This Plan is a bridge to the future we imagine. Achieving success and meeting our goals will require skilled leadership to foster a high level of inclusion and engagement across our network. We look forward to executing this plan the additional learnings and opportunities it will bring, and delivering on these goals to move us into the future.

The Council of New Jersey Grantmakers' Strategic Plan is the result of the hard work of many. We are grateful for the hours of thoughtful input, guidance, and support given by leadership and members of the strategic planning committee, and CNJG's leadership and staff.

Andy Fraizer, Co-Chair, Community Foundation of South Jersey

Maisha Simmons, Co-Chair, Robert Wood Johnson Foundation

Jeffrey Vega, Chair, Princeton Area Community Foundation

Craig Drinkard, 1st Vice-Chair Victoria Foundation

Christine Healey, 2nd Vice-Chair, The Healey Education Foundation

Michael Unger, Treasurer, The Atlantic Foundation

Jeremy Grunin, Grunin Foundation

René Deida, Prudential Foundation

Theresa Jacks, Acting President and CEO, CNJG

The Staff of CNJG

Thank you also to the Robert Wood Johnson Foundation and Grunin Foundation for providing grant funding in support of the strategic plan.

EXECUTIVE SUMMARY

This initiative officially launched in September 2021, and the Strategic Planning Committee, led by Board members Maisha Simmons, Robert Wood Johnson Foundation, and Andy Fraizer, Community Foundation of South Jersey, has guided progressive development. This process comes at a crucial juncture while we consider not only the challenges of our time, but the opportunities that lie ahead and the role of philanthropy in making a difference in the quality of civic life and engagement in the state of New Jersey.

The strategic planning process engaged CNJG members, nonprofit and other external partners, and a landscape scan of the philanthropy ecosystem. Below is a summary of our approach, findings, and the final plan.

Four Guiding Questions

Four (4) questions guided the strategic planning process:

1. What opportunities does CNJG have to distinguish itself as a sector leader and innovator?
2. In what ways can CNJG make a more significant difference in the results of grantee-funded programs and services to constituents and communities to achieve intended outcomes?
3. In what ways can the Council and its members significantly increase their respective financial portfolios to fulfill the mission and vision of CNJG and their own grantmaking entity?
4. What internal capacity or reorganization is needed for CNJG operations to keep pace with current membership and sector demand, as well as the robust implementation of evolving strategy from the current 3-yr. strategic planning process?

The Planning Process

The planning process was comprised of a full series of discovery activities, including internal documents review of policies and practices, surveys, focus groups, one-to-one key informant interviews, SWOT analysis, business model canvas, secondary data sources of philanthropic research, trend reports, and benchmark analysis. The survey, interview, and focus group participants consisted of CNJG staff, Trustees, members, and interested parties external to the organization from the nonprofit and government sectors.

The Board of Trustees met in a retreat to develop ideas, goals, and strategies informed by discovery findings that position CNJG to effectively respond to existing and forecasted conditions, both internally and externally, and align those strategic responses with the mission, vision, and values of the Council.

The Racial Equity Task Force Recommendations

Critically informing the work and final plan are the Racial Equity Task Force recommendations below. Philanthropy should take immediate action to promote racial equity. Recommended steps include:

- Engage in learning as a mechanism for understanding where we are.
- Acknowledge the history of philanthropy and racial inequities.
- Take responsibility.
- Create accountability mechanisms to track equity efforts and impact.
- Examine how funds are invested and how investments are not contributing to racial inequities and are promoting racial justice.
- Engage in Trust-Based Philanthropy.
- There are opportunities to infuse this work throughout organizations both at CNJG and among our members.
- Revisit your mission and vision considering racial equity.
- Find opportunities to take incremental steps such as revisiting your policies and procedures.

The Strategic Planning Committee incorporated these recommendations throughout the discovery, analysis, and writing processes of the Strategic Plan. The vision, mission, and core values have been revised as recommended. The Plan's goals were developed with equity and inclusion as measurable benchmarks to ensure accountability.

Equity is a critical factor throughout. Additionally, as noted in the introduction, the language of racial equity was expanded to the more inclusive term, equity. Racial equity retains primacy, but the discovery process findings consistently raised the sector's role in addressing inequities and disparities experienced by people of all places, racial identities, socioeconomic backgrounds, abilities, and identities.

In addition, the Committee added Participatory Philanthropy to the recommended practice of Trust-based Philanthropy. These overlapping practices are coming to the fore as the sector reflects on how best to address

poverty, inequality, and injustice in marginalized communities and other philanthropic goals.

- The “trust” in Trust-Based Philanthropy refers not only to donors’ trust in their grantees, but also to grantees’ trust in their donors. At its core, trust-based philanthropy is about redistributing power—systemically, organizationally, and interpersonally—in service of a healthier and more equitable nonprofit ecosystem.⁴
- Participatory philanthropy is a continuum of practices that encompass engaging beneficiaries and other interested parties in the entire range of decisions that a funder makes. The practices center around shifting decision-making power to those most affected by a funder’s decisions rather than simply building trust. Practices include collaboratively identifying funding priorities, developing strategies, application evaluation and decisions, project monitoring, and evaluation. (Note that the term ‘participatory grantmaking’ refers to the “grant” portion of this process.⁵)

Key Findings of Discovery

Issues and Trends

Racial, economic, and health inequities have created a convergence point in philanthropic work. Racism is understood to be the historical and current driver of economic and health disparities and other social inequities. Today, the sector widely discusses how philanthropy can pivot sector policies and practices to advance racial equity and justice to positively impact the social good.

This convergence has also produced public criticism toward the sector and its wealth (old and new) as having been acquired at the expense of the social good and is built on racist and white privileged systems and policies. In

⁴ CHAPTER 13 Trust-Based Philanthropy and Participatory Philanthropy. Stanford PACS, Center on Philanthropy and Civil Society. (n.d.). Retrieved June 2022, from https://pacscenter.stanford.edu/wpcontent/uploads/2021/10/Guide_FINAL_chpt.13_8.5x11.pdf

⁵ CHAPTER 13 Trust-Based Philanthropy and Participatory Philanthropy. Stanford PACS, Center on Philanthropy and Civil Society. (n.d.). Retrieved June 2022, from https://pacscenter.stanford.edu/wpcontent/uploads/2021/10/Guide_FINAL_chpt.13_8.5x11.pdf

response, there are calls within and outside the philanthropic sector for the following trust-based and participatory philanthropy goals and practices.

Our discovery activities sought reflections, insights, and recommendations from our members and partners on how the Council, as a philanthropic supporting organization, can provide guidance and support to their efforts at navigating and responding to this moment. Below is a high-level summary of what we heard.

Partner Reflections: Critical Issues & Aspirations

Survey responses, focus groups, and interviews identified the following specific critical issues and aspirations for the sector.

- Desire for fostering a greater collective impact through collaborative partnerships across the philanthropic and social sectors.
- Need to address sector fragmentation and silos stemming from New Jersey's varied geography, populations, and interests.
- Racial equity and diversity, equity, and inclusion are widely recognized shared values across the sector, but confusion exists on how to act on the need for greater equity and inclusion. Participants requested capacity-building opportunities, cross-organizational learning and mentoring programs, and other learning resources.
- Call for trust-based and other equity-advancing philanthropic practices.
- Making the public aware of all the ways philanthropists engage in civic life beyond grantmaking, such as advocacy and policy development, learning facilitation and resource-sharing to build capacity and nurture advances, facilitation of collaborations and partnerships, and elevation of issues and promising investments of time, talent, and treasure with the public.

CNJG'S Value Propositions & Business Model Assessment

Some of the most visible elements of the CNJG business model that capture value for members and the sector include its affinity groups- regarded as a backbone of CNJG programming; provision of connections; facilitating convenings and peer-learning opportunities; research capabilities; disaster-based response and leadership; and partnerships with local and regional nonprofit groups.

Less visible at times, but undergirding the Council's value, is its capacity to function as a learning organization that advances policy and advocacy work

on behalf of the sector. CNJG consistently works to create, acquire, and transfer new knowledge and insights to its membership, the broader philanthropic sector, and the policy-level decisions that shape the environment in which philanthropy works.

Respondents identified a need for expanded utilization of communication channels, including social media. Communication channels are key tools in the value stream CNJG employs to message constituents at all levels of engagement, with most communication executed via the website, e-communications, and the CNJG Newsletter.

The most significant of the assessment findings were the limitations of the business model. Many believe that the Council is at a choice point in the market. To move forward, staff and Trustees must consider and adopt a funding model that will ensure a budget that supports the organizational capacity to execute the Strategic Plan.

VISION

The Council of New Jersey Grantmakers envisions a healthy, thriving, and civically engaged New Jersey where people of all places, racial identities, socio-economic backgrounds, abilities, and identity expressions are valued for their gifts and talents, and we all can reach our full potential and participate generously in the common good.

MISSION

The Council of New Jersey Grantmakers supports and elevates New Jersey's philanthropic community through shared learning, collaborative and trusting relationships, network building, and leadership.

CORE VALUES

CNJG values **shared power and leadership** to advance our mission and vision. We look for opportunities for individual members, member institutions, and allied organizations across the social sector to engage in a common cause of supporting and elevating New Jersey's philanthropic community.

From expanding access to programs to exploring the inequitable origins of wealth, CNJG values **equity** as an organizing principle and lens for looking at our structure, business model, programs, and communications.

CNJG values **trusting cross-sector relationships** grounded in inclusion that seek out diverse voices, contributions, and participation from across the social sector. We are a network that works to form new alliances and broad coalitions to advance our mission and vision.

CNJG values **learning and dialogue** across our community as we explore, engage, and identify new ways of organizing ourselves and redefining philanthropy in broader ways.

GOALS

As noted in the analysis work that helped shape the thought process for this strategic plan, the philanthropic sector is undergoing significant change, including calls for greater diversity, equity, and inclusion at every level of philanthropy. With this backdrop, CNJG seeks to act on its core values of shared power and leadership; equity; trusting and cross-sector relationships; and learning and dialogue to champion the cause of equity as a top priority and commitment. Our vision for leadership calls for broadening the scope of participation, learning, and power-building among funders, donors, and program partners to positively impact the broader New Jersey social sector.

Therefore, in response to the identified sector disruptors, feedback from internal and external stakeholders, and aligned with our mission to support and elevate the communities we serve, CNJG will pursue the following strategic goals:

GOAL 1: Implement an Inclusive and Sustainable Business Model

CNJG will update the organization's operating model in priority focus areas including, but not limited to: growing and diversifying a membership structure that reflects an expanded definition of philanthropy and geographic framework aimed toward increasing diversity and inclusion in the membership portfolio. This strategic priority seeks to support and enhance the Council's programmatic proficiency, delivery of programs and services, and fiscal durability. These, and other modifications, will be reflected in human resources, funding, and capital structure that matches an expanded scope of work, mirrors the growing needs of member organizations and the sector, and sustains the organization over time.

Cost analysis and sustainability-driven financial modeling will factor in current funding streams. These include membership fees, funding for programming, and special projects. Modeling will also explore non-dues and grants-based funding streams, such as fee-for-service opportunities, and operating cash-flow requirements to address actual program costs and operating expenditures. The process will be informed by the strategic planning committee and philanthropy partners including an integrated, 3-5 member culturally diverse cohort, to ensure consideration of CNJG core values and equity principles in all facets of the business model. Goal to be accomplished by December 31st, 2027.

Identify/Create a culturally diverse 3–5-member cohort group with a dual skill set to both cross-reference equity principles in the business model and inform inclusion strategies in areas including human resources, program development, collaborations, and partnerships. This group will work in conjunction with the membership committee in a lead role, as well as the strategic planning committee and full board to monitor the implementation of the plan.

Research nonprofit, intermediary, and membership business models relevant to the framework of philanthropy-serving organizations; funding for PSO special initiatives; and general operating grants.

Research/Identify a membership model that provides a platform for engagement, meets the needs of constituent organizations, and aligns with CNJG’s equity initiative, with the membership model serving as the cornerstone of the broader business model to build and sustain a community of practice.

Research fee-for-service structures and operations, including opportunities for training, coaching curriculum development, consulting, and back-office services.

Vet membership structures for relevance and compatibility to CNJG’s operating goals.

Reshape and modify a membership structure inclusive of governance policy, eligibility requirements, and dues requirements.

Conduct member services and program audit (to streamline program offerings).

Revisit and assess the organizational chart, staffing patterns, and core competencies.

Pilot, monitor, and evaluate results of the modified business model.

Report on operating model integrity and effectiveness for long-term plan consideration.

Committee Charge: Strategic Planning Committee supported by CNJG staff.

Milestones: Annual President’s Report highlighting progress; Annual Members Meeting (open) Report on Progress; Approved Business Model.

GOAL 2: Embed Our Values and Principles

CNJG will embed an organizational commitment to equity and power-building by December 31, 2027. We will define philanthropy as a broad and inclusive set of tools to improve civic health in New Jersey communities. Our membership will be inclusive of individual and communal actions. CNJG will seek community engagement in the discussion and adoption of equity principles, and members will apply these fundamental principles to their own path of learning and organizational growth. CNJG will support members on their journey as they understand, begin, and aspire to collectively advance equity in philanthropy. This initiative will be informed with input from the CNJG Board Executive Committee and a cohort group of 5-7 select BIPOC leaders, looking through multiple lenses across the CNJG spectrum, including membership, that centers on equity in all levels of the Council's work.

Identify/Establish an internal, strategic plan-specific committee and cohort group of BIPOC sector partners.

Explore and clearly define equity integration in the context of all levels of CNJG work, including its influence in the broader philanthropy landscape.

Apply the recommendations of the CNJG Racial Equity Task Force based on the extensive review and adoption of equity principles conducted over the past 24-months.

Vet relevant and appropriate integration models for key components required to facilitate the centering of equity in CNJG's civic and philanthropic leadership and governance.

Develop or modify a CNJG Equity Integration Model to guide the practices and activities of the Council and its members. The model will provide a developmental framework, whereby each member organization has its own starting point.

Pilot, monitor, and evaluate results of equity integration efforts.

Report on model integrity and effectiveness for long-term plan consideration.

Committee Charge: CNJG Board Executive Committee supported by CNJG staff.

Milestones: Annual President's Report highlighting progress; Annual Members Meeting (open) Report on Progress; Approved Equity Integration Model.

GOAL 3: Amplify Our Collective Voice

The CNJG Board of Trustees will approve a social sector-wide Policy and Advocacy Agenda designed to provide leadership for sector-critical issues and causes, including those that advance equity. The Board will define at least two (2) priority focus areas of policy and advocacy activities, supported by member participation of at least twenty-five percent (25%), representative of the three-state geographic regions of North/Central/South Jersey.

To establish common threads across the work of significant partner organizations, CNJG will create a Policy and Advocacy Agenda that closely aligns with the New Jersey Center for Nonprofits. The agenda will also highlight approaches such as Participatory Philanthropy, which centers on the concept of power-building in philanthropy by including constituent, community-based organizations in the discussion of what priority community need should be addressed, and who should be funded in terms of the organization receiving support to address the need. This goal will be informed with input from the CNJG Board Leadership and Policy Committee and a select racial and ethnically diverse constituent cohort of 3-5 sector partners, to be accomplished by December 31st, 2027.

Identify/Establish a partner cohort group of 3-5 racially and ethnically diverse sector partners. This cohort group will work in conjunction with the Leadership and Policy Committee.

Research current issues and challenges impacting the New Jersey philanthropic sector, including applicable existing policy at the federal, state, and local levels.

Review and align CNJG and New Jersey Center for Nonprofit's policy and advocacy agendas.

Vet planning and implementation models relevant to the CNJG policy/advocacy vision.

Develop or modify a comprehensive implementation plan including a communication apparatus.

Pilot, monitor, and document findings and evaluate results.

Report on effectiveness of policy/advocacy operations and interim sector impact for long-term plan consideration.

Committee Charge: CNJG Board of Trustees - Leadership and Policy Committee supported by CNJG staff.

Milestones: Annual President’s Report highlighting progress; Annual Members Meeting (open) Report on Progress; Approved Policy and Advocacy Agenda.

GOAL 4: Leverage Partnerships to Unite the Social Sector

CNJG seeks to build upon a long history of community partnerships by expanding and establishing formal partnerships and collaborations to raise the Council's profile, create more value for member-organizations and the social sector, and catalyze other partnerships in support of all our communities. In this context, CNJG is openly seeking to engage in a process designed to strengthen our working relationship with the New Jersey Center for Nonprofits, undertake strategic conversations, and progressively integrate our work. To this end, CNJG will document in writing current collaboration and explore new possibilities with the New Jersey Center for Nonprofits to achieve the mission of each organization.

Additionally, CNJG will target community foundations for collaborations/partnerships to support the leveraging of resources and enhance the capacity to build community-level coalitions and connections, as community foundations actively participate in addressing community needs with an intimate working knowledge of family, neighborhood, and community dynamics, strengths, and challenges. To help build empowered communities, CNJG will work at the intersection of trust-based and participatory philanthropy to enhance engagement capacity at the community level, while advancing the ideal of democratizing philanthropy in New Jersey. To this end, CNJG will seek to establish a “Partnership Agreement” with one or more community foundation(s) as a disciplined experiment or explore support for community-based and participatory philanthropy as part of the business model analysis.

In conclusion, two (2) written agreements will be pursued and secured to expand the CNJG scope of work and business model. Strategies for this initiative will be informed with input from the Strategic Planning Committee and a select racially and culturally diverse 3–5-member constituent cohort group charged with considering the application of equity principles in formulating goals, terms, and expected outcomes of collaboration/partnership agreements. This goal is to be accomplished by December 31st, 2027.

Identify/Create a select racially and culturally diverse 3–5-member constituent cohort group. This cohort will work in conjunction with the CNJG Strategic Planning Committee.

Research, document, and assess community philanthropy practices utilized in New Jersey and nationally by community foundations. Investigate participatory philanthropy capacity-building efforts utilized by other state and regional philanthropy-serving organizations.

Vet key partnership/collaboration opportunities (prioritize).

Develop a partnership development plan with goals, objectives, and targets (including community foundations) to prepare for initial contact and negotiations.

Initiate contact and arrange an interest meeting for preliminary discussion.

Leverage the Newark Philanthropic Liaison model as a person-centered approach to community philanthropy and explore lessons to grow participatory philanthropy as a practice with targeted community foundations.

Pilot, monitor, and document partnership outputs and outcomes, and evaluate results.

Report on impact of the partnership and process for long-term plan consideration.

Committee Charge: Strategic Planning Committee supported by CNJG staff.

Milestones: Annual President's Report highlighting progress; Annual Members Meeting (open) Report on Progress; Approved Partnership Development Plan.

MONITORING OUR PROGRESS

The Strategic Planning Committee is committed to ensuring that monitoring and accountability mechanisms are in place for these strategies in accordance with the following framework. As detailed implementation plans are developed, we will be asking how each strategy and accompanying tactics:

- Solves for inequity
- Multiplies the menagerie (incorporate different voices, abilities, cultures, races, ages, and lived experiences)
- Applies racial equity values
- Roots a commitment to relationships and human-centered, not transactional, engagement, and
- Targets generational transformation.

GLOSSARY

ACCOUNTABILITY refers to the ways in which individuals and communities hold themselves to their goals and actions and acknowledge the values and groups to which they are responsible.

BELONGING is the outcome of holding space where everyone truly feels empowered to speak up, make change, and shift the culture.

CIVIC HEALTH: The way that communities are organized to define and address public problems. Communities with strong indicators of civic health have higher employment rates, stronger schools, better physical health, and more responsive governments.

DIVERSITY is the presence of difference.

EQUITY, in many regards, includes the norms, fundamentals, and/or policies in places that ensure everyone has access to the same opportunities.

INCLUSION refers to environments in which any individual or group can be and feel welcomed, respected, supported, valued, relied upon, fully participate, and matter.

INTERSECTIONALITY is the interconnected nature of social categorizations such as race, class, and gender as they apply to a given individual or group, regarded as creating overlapping and interdependent systems of discrimination or disadvantage.

INSTITUTIONAL RACISM is the discriminatory treatment, unfair policies and practices, inequitable opportunities, and impacts within organizations and institutions, based on race, that routinely produce racially inequitable outcomes for people of color and advantages for white people. Individuals within institutions take on the power of the institution when they reinforce racial inequities.

OTHERING is a pattern of exclusion and marginalization of individuals or groups of people based on their having identities that are different from and generally inferior to the group you belong to.

PARTICIPATORY PHILANTHROPY is a continuum of practices, which encompasses engaging beneficiaries and interested parties in the entire range of decisions that a funder makes. The practices center around shifting decision-making power to those most affected by a funder's decisions, rather than simply building trust. Participatory philanthropy can take place during the pre-grant phase of identifying funding priorities and developing strategies, the grant phase where applications are evaluated and grant decisions are made, and the post-grant phase where monitoring and evaluation are

considered. Participatory grantmaking specifically refers to the “grant” portion of this process.

PHILANTHROPY refers to a broad range of charitable acts (e.g., donating funds, volunteering one’s time) that help others or contribute to the well-being of society overall.

PHILANTHROPY-SERVING ORGANIZATION: non-grantmaking entities that bring funders together to network, learn best practices or new practices, and gain information that can inform and improve their giving. Philanthropy-serving organizations are part of the infrastructure of philanthropy.

PLACE-BASED PHILANTHROPY: a philanthropic approach that targets a specific location—be it a neighborhood, municipality, or even multiple counties—upon which to focus charitable resources and make a transformative impact. By directing philanthropic assets to a particular geographic region and coordinating local partners, financial capital, social networks, and expertise is leveraged to:

- break down the complexities and tackle the root cause(s) of an issue
- identify a comprehensive—perhaps even cross-sector—approach to tackling those issues
- generate lasting, transformative change within the chosen community, and
- sustain the momentum with the end-goal in mind.

SOCIAL SECTOR: The individuals and organizations who advance human dignity and social justice through advocacy, service, policy research, and/or philanthropy or impact investing.

STRUCTURAL RACISM is the arrangement of institutional, interpersonal, historical, and cultural dynamics in a way that consistently produces advantages for whites and chronic adverse outcomes for people of color.

TRUST-BASED PHILANTHROPY: At its core, trust-based philanthropy is about redistributing power—systemically, organizationally, and interpersonally—in service of a healthier and more equitable nonprofit sector. On a practical level, this includes multi-year unrestricted funding, streamlined applications and reporting, and a commitment to building relationships based on transparency, dialogue, and mutual learning.