

STRATEGIC PLAN  
2020-25



## Dear Friends:

There are two things we know to be true: Rose Community Foundation has a rich history of living its values through grantmaking, advocacy and philanthropic services in pursuit of making our community a better place for all. At the same time, through nearly every conceivable lens, the seven-county Greater Denver region – and the world around us – has changed dramatically in the quarter-century since Rose Community Foundation was created.

The dynamics of our ever-changing region obligate us to ensure that the Foundation’s work – and the ways in which the Foundation conducts that work – continue evolving to meet the community needs and philanthropic best practices of today and tomorrow.

Understanding the responsibility and opportunity presented by an era of new leadership at the Foundation – and embracing a values-oriented legacy with roots stretching back to the opening of General Maurice Rose Memorial Hospital in 1949 – the Foundation’s board and staff spent 2019 engaged in reflection, exploration and aspiration to inform the development of a new strategic plan. Through interviews, focus groups and surveys, we engaged hundreds of diverse voices to provide feedback and insights on the strengths, needs and opportunities both within our region and our organization.

As our board affirmed at the outset of our strategic planning process, we remain steadfast in three core commitments: we are committed to strengthening the seven-county Greater Denver region, we are committed to supporting the local Jewish community and we are committed to supporting the philanthropy of our donors, whose generosity is a powerful force for regional good.

For those who have long histories with the Foundation, we trust you will find much that is familiar in these pages. Our core DNA is very much the same but expressed more boldly and with specific intention and relevance for the world in which we all live today. For those who are less familiar with Rose Community Foundation – or who have historically known only one part of our work through a particular program area or department – we hope these pages will illuminate a more cohesive and integrated picture of our multi-faceted work.

The challenges our community faces do not fit neatly into buckets, nor do the solutions. As such, we are removing the silos that have historically defined—and today, perhaps, confine—our work and are instead organizing our efforts in pursuit of three important and ambitious impact goals that recognize the intersecting nature of community needs.

We will lean into the unique roles afforded to us as a community foundation: our ability to support donor philanthropy and be a catalyst to grow the charitable resources dedicated to strengthening our region, and the opportunity we have to support and leverage policy and advocacy work in pursuit of our mission.

This strategic plan represents our shift from acting as a knowing organization to a learning organization. We will know enough to ask the right questions, but not so much that we don’t listen to the answers. The data and feedback we collected during our strategic planning process in 2019 was truly a gift. Ensuring that we create ongoing opportunities for learning, community engagement and input to continue to shape our future work is of critical importance to us.

The key elements of this plan are refreshed Mission, Vision and Values statements that clarify our role and aspirations in serving our community and new Goals and Strategies to guide our work, accompanied by the rationale behind our priorities. Grant opportunities aligning with our new goals will still exist in the historic areas in which we have funded, and opportunities will become available in some important new areas as well.

With the publication of this report, we end our strategic planning journey and begin an important new phase for the organization. We are eager to shift our focus now to setting the necessary pieces in place as we animate the ideas spelled out in our plan. Thank you for your ongoing partnership as Rose Community Foundation enters an exciting new chapter.



**Lindy Eichenbaum Lent**  
President & CEO



**Katherine Gold**  
2018-19 Board Chair



**Steven A. Cohen**  
2020-21 Board Chair



## Background



For nearly 25 years, Rose Community Foundation has supported the Greater Denver community through grantmaking and stewardship of donor and nonprofit assets. Rose Community Foundation was chartered as a community foundation in 1995 and endowed with initial assets of more than \$170 million from the sale of Rose Medical Center, a beloved hospital created by the Denver Jewish community in 1949.

Following World War II, as discriminatory practices lingered and Denver's population boomed, the Denver Jewish community saw a need for a hospital to serve the entire community – in all its diversity – with a commitment to excellence in care. When Rose Medical Center opened its doors, it was the first hospital in Denver to allow physicians to practice regardless of their race or religion.

Rose Community Foundation has always been an independent nonprofit entity separate from the hospital, but we proudly carry on the legacy of the hospital founders' tradition of philanthropy, nondiscrimination and commitment to serving residents and enhancing the quality of life across the Greater Denver region<sup>1</sup>.

We provide an array of philanthropic services work, stewarding donors' philanthropic assets and supporting their grantmaking, while helping nonprofits sustain their missions through the creation and growth of endowments. In complement, the Foundation provides programmatic grants and leadership supports across the seven-county region, historically focusing in the areas of Aging, Child and Family Development, Education, Health and Jewish Life, and more recently adding support of organizations working with immigrants, refugees and communities vulnerable to discrimination and hate crimes.

Across its nearly 25-year history, the Foundation's endowed grantmaking has been both responsive – making grants to support nonprofit programs, services and capacity – and proactive, creating initiatives to meet emerging or longstanding community needs. In some cases, we have been fortunate to partner with and work alongside other funders and foundations; in other cases, we have joined forces with local or regional government in collaborative pursuit of a stronger community.

In both programmatic and philanthropic services work, the Foundation utilizes the varied tools of philanthropy – including grantmaking, collaboration, community leadership, donor engagement and knowledge generation and sharing – to empower Denver-area residents and support positive social change. Drawing on assets originally generated by the region's Jewish community through its efforts to create and sustain Rose Medical Center, the Foundation's values and priorities have continued to be informed by Jewish history and traditions.

In all, the Foundation has granted more than \$304 million to 1,901 organizations and initiatives in the Greater Denver region, which includes \$44 million in facilitated grantmaking from donor-advised funds. We have supported nearly 70 nonprofit organizations in creating and growing endowments to sustain their vital work into the future, currently stewarding \$31 million in endowed assets. The Foundation has \$300 million in total assets under management, with annual grantmaking of nearly \$25 million.

While proud of the work we have accomplished since our inception, the Foundation's board of trustees and staff appreciate that serving the community effectively in perpetuity requires remaining responsive to evolving community needs of today and tomorrow. In this spirit, bolstered by new executive leadership, the Foundation's board of trustees engaged in comprehensive strategic inquiry over the course of 2019, collectively asking and answering questions about the region's pressing needs and opportunities and, in complement, elucidating the Foundation's vision for how it will serve the region in the future.

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<sup>1</sup> We use the terms Greater Denver and Greater Denver region throughout to refer to the seven-county region Rose Community Foundation has historically served and will continue to serve of Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas and Jefferson counties.



## Rose Community Foundation's Strategic Planning Process

At the outset, Rose Community Foundation's guiding questions for strategic planning included the following:

- How will the region's growth, needs, evolving demographics and funding landscape shape the Foundation's grantmaking going forward? And how might our approach to funding more closely align with and respond to the interconnected nature of the challenges and opportunities facing the community?
- How can we most effectively empower and partner with our grantees to support them in pursuing their missions?
- How can we bring our core functions (program work and philanthropic services) more closely together to create synergies and magnify impact for all those served?
- How will equity inform the Foundation's work to support the leadership of people and communities throughout Greater Denver, many of whom historically and currently face discrimination and structural barriers?
- How can we intentionally leverage all our resources – including staff, relationships, networks and financial assets – in coordinated pursuit of social change and justice?
- In the context of all above, how can the Foundation's Jewish history and animating Jewish values continue to inform the Foundation's priorities, culture, approaches and support of the Jewish community and broader community?

To facilitate and support this journey, we engaged the TCC Group, a mission-driven consulting firm with extensive experience in philanthropic strategy and funder collaboration, to design, guide and collaboratively facilitate the 2019 strategic planning work. TCC Group's knowledge not only of the philanthropic and nonprofit fields broadly speaking, but also of community foundations, health conversion foundations and Jewish foundations and nonprofits, made them a natural partner and effective resource. They brought strong data analysis practices, a perspective that includes a deeply collaborative approach to creating strategy and experience in guiding foundations to advance equity change and to engage racially, culturally and socio-economically diverse groups of stakeholders in change processes.

The highly participatory and iterative planning process began by engaging the Foundation's board and staff in conversation about past accomplishments and future aspirations, strengths and growth opportunities. This effort included TCC Group's interviews with a cross-section of board and staff members, two focus groups: one with staff and a second with board members, and the formation of a Strategic Planning Advisory Committee comprised of four board members and four staff members. In all, the entirety of the Foundation's board and staff were involved at the outset, grounding planning in the perspectives and insights of those closest to our work. At the same time, TCC reviewed an array of institutional materials (program documents and theories of change, evaluation and culture assessments, public reports, departmental documentation, etc.) to acquire solid understanding of the Foundation's past work and leadership conversations.

Next, the strategic planning process shifted to the external and engaged a broad and diverse range of community members in seven focus group conversations (involving a total of 80 participants) and an additional 20 interviews. We specifically sought to engage people of diverse identities and backgrounds, across different sectors and geographies and with varying types and degrees of connection to us and our work. They ranged from longstanding grantees, fund holders and peer foundations to those with whom Rose Community Foundation has not worked closely in the past, but whose knowledge and vantage points the Foundation was eager to solicit to inform future direction. Stakeholders shared their insights about current and anticipated needs and opportunities in the region, while also providing feedback on the Foundation, the role it has played in strengthening the community and opportunities where we can do better.

Prior to embarking on the strategic planning process, the board of trustees reiterated Rose Community Foundation's commitment to continued funding in support of the Greater Denver region's Jewish community. As a result, in complement to institution-wide planning, TCC Group also worked closely with the Foundation's Jewish Life staff and committee – one of five program committees serving each of the Foundation's longstanding grantmaking areas – to support this program area's strategic refresh. Insights regarding the character, priorities and needs of Greater Denver's Jewish community were informed by 139 respondents to TCC's survey of Jewish stakeholders and Jewish-serving organizations across the region, as well as two additional focus groups and 10 interviews with Jewish organizational grantees and donors. Additional data points were provided by the 2018-2019 Greater Denver Jewish Community Study, performed by Brandeis University and commissioned by Rose Community Foundation, which surveyed more than 2,500 Jewish households in the Greater Denver region. Inquiry and strategy support work for the Jewish Life strategic refresh complementarily supported institution-wide consideration of how the Foundation's Jewish history and values inform its work overall, and the new Foundation-wide goals symbiotically influenced the resulting Jewish Life strategic refresh as well.

Over the course of the year, Foundation board and staff learned from TCC's research and generation of reports and resources on landscape trends in the Greater Denver region, sourced from extensive trends analysis of more than 55 publicly available reports, websites and regional studies. Qualitative and quantitative analytic findings and their implications were discussed over a series of meetings among the Foundation's board and strategic planning committee, enabling shared learning, consensus building and consideration of new strategic priorities. Additionally, at every stage, the Foundation's staff reviewed and reflected on data and insights gathered.



## Landscape Analysis: A Snapshot of Trends in the Greater Denver Region

Rose Community Foundation's abiding commitment to enhancing the quality of life for all community residents guided its analysis of the region's dynamic strengths and challenges. Findings from the regional landscape analysis conducted through the planning inquiry informed board and staff conversations and the board's adoption of a recalibrated mission and new strategic priorities.

Viewed in one light, the Greater Denver region is prospering. The region is experiencing significant growth, attracting young people, families and older adults to the seven-county area at more than double the rate of growth for the U.S. population overall.

Increasing population density is coupled with increasing diversification. Whereas in 1990, one-fifth of Greater Denver's residents identified as people of color (encompassing Latinx, Black, Asian or Pacific Islander, Native American and other identities), fully one-third identified as people of color by 2015, and by 2050 a majority of Denver metropolitan residents are projected to be people of color.

Diverse residents, including growing immigrant populations, are making essential contributions to Greater Denver, enriching the region with their experiences, cultures and values; starting businesses; building housing; caring for the state's growing older adult population; and much more. But by and large, these residents are not experiencing the benefits of Greater Denver's dynamic development and prosperity. Rather, systemic barriers result in growing inequities across the region, with people of color disproportionately lacking equitable access to affordable housing, a living wage, high-quality health access and outcomes, and quality education. A partial list of illustrative challenges includes:

- Family-supporting jobs and affordable housing are less available to residents in Denver and Adams counties, the two most racially and ethnically diverse counties in the region. The growing lack of affordable housing, especially in Denver County, is pushing families and individuals (particularly those with limited resources) farther away from the jobs and services they need to survive, much less to thrive;
- Adams County currently ranks as the most diverse, youngest and, second only to Denver, lowest income county in the region;
- Denver, Adams and Arapahoe counties report the largest shares of students who qualify for free or reduced-price lunches, a proxy for economically vulnerable families;
- African American/Black Denver-area residents experience more than twice the level of unemployment reported by non-Latinx white and Asian/Pacific Islander residents;
- African American/Black and Latinx Denver-area residents have shorter life spans and poorer health outcomes than non-Latinx white residents.

Materials reviewed and stakeholders interviewed over the course of strategic planning argued that, in addition to support of nonprofit organizations working to address these issues, changes in regional policies in areas such as housing, transportation, education, health care and employment are also essential to address disparities in access to the region's rich assets and prevent them from widening in the years ahead.

## IV.

### Strategic Plan: Who We Are and What We Believe

The Foundation's nearly year-long strategic planning process yielded enthusiastic adoption of an updated Rose Community Foundation mission, vision and set of values; seven strategic goals and an associated set of strategic objectives through which each goal will be pursued; and preliminary, broad-scale agreement about Foundation roles, core constituencies and vital partnerships to pursue in the years ahead.

Rose Community Foundation's work is powered by our mission, vision and values. These core tenets will guide how we seek to build authentic relationships with diverse partners and communities – including the region's nonprofit community; cultural, religious and business institutions; donors; peer funders and civic partners. Developed and adopted through collaborative dialogue among our board of trustees and staff, the following statements mutually reinforce and support each other. Taken together, they define how, why and where we aim to lead and partner.

#### Mission

To advance inclusive, engaged and equitable Greater Denver communities through values-driven philanthropy.

#### Vision

A thriving region strengthened by its diversity and generosity.

#### Values

Universal in aspiration and anchored in the Foundation's Jewish roots and legacy, our values guide the work we do and how we do it, both within the Jewish community and in the Greater Denver region, providing a unifying sense of who we are as an organization.



Rose Community Foundation's values convey our ethos and animate our work.

## JUSTICE

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We take action to address pressing issues in our community in pursuit of fairness, humanity and justice.

*Do not stand idly by in the face of suffering or injustice | Lo Ta'amod Al Dam Rei'echa*

## EQUITY

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We advance a more equitable region that provides opportunity and access for all, recognizing that historic and systemic barriers exist based on race, resources and gender.

*The ethical responsibility to right the scales of justice through philanthropy | Tzedakah*

## DIVERSITY AND INCLUSION

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We believe all people - regardless of race, ethnicity, religion, gender, gender identity, age, sexual orientation, ability or country of origin - are equal and worthy of dignity, honor and full inclusion in community life.

*All of humanity is created in a divine image | B'tzelem Elohim*

## EMPATHY

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We strive to understand the perspectives of individuals, communities and organizations in our region, and to ground our actions in this understanding.

*Our experiences - historic and modern-day - create inherent empathy with those in need of support or alliance*

*| Avadim Hayinu B'Mitzrayim*

## GENEROSITY

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We encourage and practice generosity, and our giving is informed by the interests, needs and dignity of the recipients.

*Honor and uphold the dignity of others | Kavod Habriot*

## TRANSFORMATION THROUGH COLLABORATION

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We join with others to work toward a common vision.

*Humanity is in partnership to create a more whole and perfect world | Tikkun Olam*

## COMMUNITY

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We believe our region needs strong, interconnected communities and honor Rose Community Foundation's Jewish roots with an enduring commitment to supporting the Greater Denver Jewish community as well as the Greater Denver region as a whole.

*Responsibility to communal needs | Kehillah*



## Strategic Plan 2020-2025: Impact Goals and Strategic Objectives

Driven by our refreshed mission, vision and values and informed by the qualitative and quantitative data gathered during our strategic planning process, we will undertake an ambitious body of work over the next few years. We commit to supporting critical change in the Greater Denver region by advancing the following three external impact goals:

### **GOAL 1** Advance equity and justice in the Greater Denver region.

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#### **Objectives:**

- Strengthen grantmaking support to advocacy and policy change organizations and efforts aimed at creating more equitable and just systems.
- Support nonprofit capacity-building as well as strategic government initiatives located in and/or serving communities farthest from opportunity.
- Continue to pursue collaborative funding opportunities to align and leverage resources.

#### **Rationale for Goal 1 and objectives:**

Greater Denver is growing at more than double the rate of the country. This growth brings tremendous opportunity yet also exacerbates longstanding challenges. At the root of these challenges is the reality that the benefits of growth are inequitably experienced across racial, gender, economic and geographic differences. While Rose Community Foundation cannot solve systemic challenges on its own, it can be a meaningful partner by supporting and advancing efforts underway to create a more equitable region. Opportunities to fund with an equity lens – and in support of equity and justice – exist across the Foundation’s longstanding focus areas (i.e., aging, early childhood, education, health, workforce development, Community Action<sup>2</sup>) while also opening new avenues to support areas of growing importance in Greater Denver (i.e., housing, transportation/mobility, economic opportunity, environment, arts and civic engagement).

### **GOAL 2** Foster an inclusive and engaged Greater Denver.

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#### **Objectives:**

- Develop flexible funding approaches that are responsive to community-identified priorities and rooted in our values.
- Support community-building and civic engagement activities relevant to fostering an inclusive climate.
- Encourage a dynamic and inclusive Jewish ecosystem that embraces a myriad of ways to be Jewish and builds enduring community infrastructure to sustain it.
- Develop and maintain greater holistic awareness of current and emerging needs and opportunities in Greater Denver.
- Selectively join and actively message the Foundation’s engagement in goal-aligned coalitions and alliances.

**Rationale for Goal 2 and objectives:**

Greater Denver is an increasingly diverse region. By 2050, a majority of Denver residents will be people of color. Recent years have seen a regional and national increase in intolerance and division, hate crimes and anti-Semitic discourse and acts. In this climate, Rose Community Foundation has an important role to play in building an inclusive and welcoming community, supporting an informed and engaged society, and advancing civic engagement for the betterment of public discourse, public policy and community interconnectivity. This work is rooted in the Foundation's animating history and Jewish values, as well as in our role as a community foundation invested in strengthening the Denver region and honoring its diversity.

**GOAL 3 Increase resources dedicated to strengthening the Greater Denver community.****Objectives:**

- Enhance and strengthen philanthropic services and advising capacity to attract and retain donors.
- Expand and enhance donor engagement and development opportunities.
- Develop approaches to engage diverse donors across generations.
- Develop asset and investment options aligned with Rose Community Foundation's mission and values.
- Advocate for policies that increase local, state and/or national resources devoted to mission-aligned public good in the Greater Denver region.

**Rationale for Goal 3 and objectives:**

As the Denver region rapidly grows and evolves, longstanding challenges are intensified, and community needs outpace existing charitable and government resources. Additionally, individual charitable giving in Denver lags behind comparably sized metropolitan regions. As a community foundation with experience working with donors from across generations, Rose Community Foundation is in a unique position to help cultivate a culture of generosity, growing the philanthropic resources available to better meet community needs and supporting donors in giving at the intersection of their interests, values and opportunities for local impact. We have untapped potential to expand, diversify and more deeply engage the donors with whom we work.

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<sup>2</sup> Community Action refers to the Foundation's funding focused on supporting immigrants, refugees and asylum seekers, as well as communities vulnerable to hate and discrimination.



## Strategic Plan 2020-2025: Organizational Goals and Strategic Objectives

To ensure our ability to advance the three impact goals identified above, the Foundation commits to pursuing the following four organizational goals and aligned objectives that entail building our own internal capacity for change:

### **GOAL 4** Strengthen our institutional coherence and alignment.

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**Objectives:**

- Align grantmaking and philanthropic services' priorities and practices with the Foundation's values.
- Develop a coordinated grantmaking approach that is integrated, flexible, community-informed, responsive and efficient.
- Explore alternative means of deploying resources in support of nonprofits.
- Identify mutually supportive intersections between grantmaking and philanthropic services.

**Rationale for Goal 4 and objectives:**

Interviewed stakeholders over the course of strategic planning observed that the Rose Community Foundation “whole” is not adding up to something greater than the sum of its parts. Better integration and alignment of the Foundation's numerous distinctive parts may help to increase nimbleness; foster opportunities for staff and board learning and collaboration; ensure greater public understanding of the Foundation's overarching value; improve responsiveness to community needs; and strengthen opportunities for impact.

### **GOAL 5** Build our capacity for community engagement.

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**Objectives:**

- Develop and utilize vehicles for ongoing community input.
- Enhance and diversify community engagement and voice within the Foundation.
- Create a culture of board, donor and staff learning about priorities, assets and needs of diverse communities.
- Continue to deepen the Foundation's emerging work to strengthen its own organizational culture and diversity, equity and inclusion (DEI) practices.

**Rationale for Goal 5 and objectives:**

Research indicates that we have substantial room to grow in strengthening relationships with communities farthest from opportunity who the Foundation values and seeks to support. Proactively and publicly signaling that community input and relationship-building is important to us in the years ahead will expand opportunities to learn from diverse voices and better support alignment between our actions, values, vision and mission.

## **GOAL 6** Strengthen our leadership voice in the Greater Denver region.

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### **Objectives:**

- Boost the Foundation’s public and visible advocacy for mission- and values-aligned work.
- Develop robust values- and mission-aligned communications capacity.

### **Rationale for Goal 6 and objectives:**

The Foundation’s past and current work is broad and abundant, receiving positive appraisals from some stakeholders. However, too few members of the community (donors, peer funders, grantees, other stakeholders) know about or understand the Foundation’s work beyond the specific “door” through which they engage with us. Actively increasing Rose Community Foundation’s leadership voice and external-facing communications will keep the community abreast of and engaged with the Foundation’s work; help identify points of alignment, leverage and collaboration with other potential partners; and provide opportunities to message the Foundation’s animating values as a driver for our work. Most importantly, our voice – like our grantmaking – is a tool we can use to affect change in our region, taking stands where appropriate on important issues that intersect with our mission, values and strategic goals.

## **GOAL 7** Build our learning and evaluation capacity.

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### **Objectives:**

- Develop a meaningful, responsive and right-sized approach to evaluating the impact of our grantmaking.
- Promote a culture of learning and data-informed institutional practices.

### **Rationale for Goal 7 and objectives:**

The changes we seek will require the Foundation to build new muscle in a variety of ways – building on our strengths while acquiring new understandings of philanthropic best practices, community issues, constituency priorities and more. Committing ourselves to fostering a culture of inquiry and learning will ensure that we can move forward most effectively in the period ahead, candidly assessing our successes and challenges, and positioning us to adapt and refine as we move forward.



## Jewish Life Strategy

Rose Community Foundation remains committed to grantmaking in support of the region's Jewish communities. As a result of our parallel Jewish Life strategic refresh, Rose Community Foundation will pursue the following objective and strategic priorities:

### **Objective: Encourage a dynamic and inclusive Jewish ecosystem that embraces a myriad of ways to be Jewish and builds enduring community infrastructure to sustain it.**

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#### **Priorities:**

- Increase strength and capacity of Jewish organizations.
- Support programs that are reflective of diverse Jewish communities and offer meaningful and relevant opportunities to engage in Jewish life.
- Support Jewish efforts seeking to advance social justice by engaging Jewish people and using Jewish values and traditions to respond to key social and economic issues of our time.

#### **Rationale for Jewish Life objective and priorities:**

World events, geographic and cultural shifts, rapidly advancing technology and the sharing of information, news and entertainment have impacted Jewish life profoundly. The Jewish community of the 21st century is voluntary, pluralistic, more diverse and open to new ideas and experiences. People are choosing to express their Jewish identities differently and may not affiliate out of a sense of obligation. Rather, they choose to identify and belong if they believe that being part of a Jewish community can enrich and inspire them and their families.

Regional data gathered and analyzed this year by TCC Group and Brandeis University's Maurice and Marilyn Cohen Center for Modern Jewish Studies and Steinhardt Social Research Institute identified challenges and opportunities that undergird Rose Community Foundation's adopted strategic direction for Jewish Life:

- More than 60 percent of local Jewish organizations responding to the survey TCC Group fielded as part of our strategic refresh identified financial viability as a major concern, and 37 percent rated themselves as not strong in terms of financial reserves.
- On that same survey, 25 percent of organizations rated themselves as not strong in donor engagement and fundraising.
- Many respondents to Brandeis' demographic study cited feeling that Jewish life is not relevant to their life right now (61 percent) and/or feeling like they do not belong (39 percent) as reasons for disconnection.

In articulating the objective and priorities that will focus Rose Community Foundation's Jewish Life grantmaking, we commit to encouraging a dynamic and inclusive Jewish ecosystem. By ecosystem, we mean all of the formal and informal organizations and programs that Jewish people and their loved ones may interact with and participate in, such as synagogues, day schools, camps, early childhood education centers, Jewish community centers, campus activities, senior housing, communal organizations and emerging programs and initiatives.

In our commitment to diverse Jewish communities, we recognize individual differences which may include, but are not limited to, race, ethnicity, family structure, political belief, geography, denomination, etc. Our desire to support diverse Jewish communities stems from an understanding that Jewish people today exist in all these categories and more, and they are more likely to involve themselves in communities and organizations that make efforts to welcome them and their full identities.

We also lift up the notion of inclusion, meaning welcoming different individuals, families and practices and creating environments where diverse individuals can feel welcome, respected, supported and valued. In these ways and more, the objective and priorities for Jewish Life reflect and advance Rose Community Foundation's values, mission and vision. At the same time, we have been and will continue to be a pluralistic funder, recognizing that in different Jewish settings, practices and perspectives on diversity and inclusion may look different. We embrace this tension and believe providing support across the many manifestations of Jewish life in our region is important to our Jewish ecosystem.

## VIII. 2020 Transition Plans

Pursuing our three impact goals will require a reorientation of our work and ongoing organizational learning. Much of this change will be iterative and unfold over the life of this strategic plan, as we build new capacity to grow and deepen our support of donors, modernize our systems and operations, and expand our communications reach. As infrastructure for this growth, we will be continuing our efforts to evolve the technology that powers our work, implementing a new enterprise software and database system this year. Our talented and dedicated staff are excited to align their roles with the pursuit of our strategic goals and priorities. And, because our longstanding lease ends this year, we will soon be moving our offices into an updated, collaboration-inspired and purpose-designed space, just a few blocks away.

In our grantmaking work, 2020 will be a year of transition from Rose Community Foundation's longstanding programmatic focus areas to an integrated and holistic approach to what we fund and a relational and trust-based approach to how we work with grantees. Going forward, our grantmaking will be organized in alignment with our three impact goals, with funds dedicated to advancing equity and justice, fostering an inclusive and engaged Greater Denver, and increasing the resources dedicated to strengthening our region, along with a grantmaking objective for our Jewish community funding focused on encouraging a dynamic, inclusive and enduring Jewish ecosystem.

We are developing grantmaking strategies and practices, new committee structures, evaluation measures and application processes in pursuit of these goals. Our new grantmaking framework will launch in the third quarter of 2020. Until then, our programs grantmaking will be exclusively proactive, meaning we will not be accepting unsolicited applications; instead, we will focus on providing transitional support to longstanding and significant grantees who would be most effected by an interruption in funding. Donor grantmaking and collaborative initiatives will continue uninterrupted.

We are intentionally calling these "transition" grants because their purpose is to minimize disruption for grantees and the communities they serve while we transition our grantmaking approach. While in some cases these may be final grants, at least for the time being, in other cases they will be a bridge to future funding. We are not closing doors to the historic issue areas in which we have funded, because the pathways to a more equitable, just, inclusive and engaged Greater Denver community depend in part on access to education, workforce opportunities, health and support for the youngest and oldest among us, but by un-siloing our work, we will also fund in new areas and pursue cross-cutting opportunities.

During the final months of our 2019 strategic planning work, we surveyed grantees, donors and members of our grantmaking committees. Input from these key constituencies is informing our operational planning for changes to program grantmaking and donor services practices. Throughout this year of transition, we remain committed to timely and transparent communication with all of our stakeholders, to soliciting and acting on feedback, and to working in ways that express our values of justice, equity, diversity and inclusion, empathy, generosity, transformation through collaboration, and community.



## IX. Conclusion

Rose Community Foundation's 2020-2025 Strategic Plan is grounded in our historic commitment to enhancing the quality of life of the Greater Denver community, while explicitly recognizing inequity in access to the resources and supports that ensure quality of life for all our region's residents. Without addressing the structural barriers that constrain access to affordable housing, a living wage, quality education, health and more, disparities are likely to grow as our dynamic region becomes more prosperous for some, but certainly not all. Our updated mission, vision, values and new goals commit us to using a broader array of foundation tools and supporting a wider range of approaches. Our new strategies involve strengthening relationships with vital community partners to more effectively learn from, partner with and robustly support Greater Denver communities, and to help ensure that the region's future growth has the potential to benefit all parts of our diverse community, especially those currently farthest from opportunity.

Indeed, we believe that an important dimension of Greater Denver's strength lies in its diversity and inclusiveness. To advance the public good, we will continue to support a thriving and diverse region, celebrating each community's distinctive strengths and assets; advancing efforts to support those communities most vulnerable to discrimination and hate; and elevating our own visible advocacy for mission- and values-aligned work.

While confident that we are drawing on a quarter-century of promising work, we also appreciate that we must build new institutional muscle if we are to succeed in achieving the changes we seek. We are grateful for the vital input we have received from so many stakeholders throughout our strategic planning inquiry, and we look forward to enhancing our community engagement practices as we move forward and continue to learn, test new approaches, adapt and evolve.

We have developed this strategic plan with the expectation that the Greater Denver region will remain dynamic for some time. Our ability to be maximally effective and responsive in the coming years requires us to be mindful of pressing needs, balancing the desire to chart a steady course with remaining flexible and responsive in real time. We will demonstrate continued listening, learning and adaptability in our approach, while remaining committed to active leadership and partnership in order to advance inclusive, engaged and equitable Greater Denver communities through values-driven philanthropy.



## Acknowledgements

We are deeply grateful to the numerous stakeholders who helped us hone our vision and develop this strategic plan over the course of 2019. Their thoughtful, engaged and dedicated work made this plan possible.

### **2019 Board of Trustees:**

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Sarah Kurz, Vice President of Communications and Outreach  
Janet Lopez, Senior Program Officer  
Patrick Sablich, Former Vice President of Philanthropic Services

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