

2016 Strategic Plan Year In Review

Introduction

We are proud of our accomplishments this year to develop and implement a strategic plan that reflects the contributions of staff from across the Foundation and our many partners. One year into our three-year strategic plan, together we are making demonstrable progress in creating pathways to opportunity for residents in our region. Forward momentum is evident in each of the plan's five strategies, and improved opportunity has taken root in each of our three priority areas. With a focus on equity, diversity and inclusion, we deployed all of the tools available to us as a community foundation to prioritize the people and places with greatest need and help shape a future where all residents thrive and contribute to the well-being of our region.

Our efforts in 2016 were tested by economic, social and political turbulence and transition, requiring the Foundation to reflect, adapt and lead. Recent state and municipal budget cuts are challenging our region's nonprofits to meet critical needs, and anticipated new reductions reflecting the acute fiscal crisis facing the City of Hartford are influencing dialogue about the role of philanthropy. Changes in leadership in the public sector and among other philanthropic partners both impacted the pace of our work and opened the door to unexpected opportunities. Violence and divisiveness in communities across the country led us to reflect on our understanding of equity and to explore how the Foundation's resources can best support civic and community engagement and leadership.

The impact that we envision from our strategic plan is complex and ambitious. As a result, measuring and understanding our impact is not a simple or short-term endeavor. We are developing a learning and evaluation approach to collect, analyze and share information that will inform our decisions and maximize the impact of our efforts. We recognize that this work must be emergent and collaborative, and may require new organizational capacities at the Foundation and within the nonprofit and public sectors.

Progress In Our Priority Areas

The first year of our three-year strategic plan builds upon our efforts under the prior plan, with a focus on equity, collaboration and systems change. We impacted each of our three priority areas -- *vibrant communities, learning from birth through college and family economic security* -- through a wide range of activity including grantmaking, commissioning and sharing research on issues critical to the region; cultivating collaborative learning opportunities among our grantees, donors and the community; building nonprofit capacity; leveraging philanthropic and public sector dollars; and engaging policymakers. In addition, we anticipate that our accomplishments in one priority area will boost impact in the others. For example, increased civic engagement and healthy nonprofits help to facilitate strong family, school and community partnerships, and successful youth and adult learners will be better prepared for career pathways that lead to family economic security.

KEY 2016 ACCOMPLISHMENTS

- ☉ Responded to the broad needs of our communities while seeding innovative approaches in our priority areas.
- ☉ Launched new collaborations and data-driven, learning opportunities with grantees, nonprofits, donors, residents and our philanthropic and public sector partners.
- ☉ Protected our endowment with modest growth despite a volatile fiscal environment.
- ☉ Provided transitional operating dollars and capacity building to nonprofits impacted by state budget cuts to help them continue to meet the most critical needs of our communities.
- ☉ Amplified our role as a convenor to build and share knowledge about our region's greatest challenges to inform and catalyze action.
- ☉ Increased deliberate outreach to donors to connect their interests with the Foundation's work and created a Board of Ambassadors to serve as a pipeline for new donors, volunteers and community leaders.
- ☉ Leveraged our assets and influence to bring new public and private dollars to the region.
- ☉ Engaged in public policy at the local, regional, state, and national levels to support and sustain our efforts.

A review of our 2016 unrestricted grantmaking reveals targeted efforts to improve opportunities for the people and places in our region with greatest need. Our restricted dollars also supported programs and projects across our three priority areas, and enabled us to reach more broadly across the twenty-nine towns we serve. We began the year with \$23.6 million in discretionary funds and \$12.7 million in restricted funds to support our strategic goals. We expect to award approximately \$35 million by the end of the year.

2016 AT A GLANCE (unaudited)			
TOTAL GIFTS:	TOTAL GRANTS:	TOTAL ASSETS:	INVESTMENT RETURN:
\$ 14.2 MILLION 1,691 Gifts 35 New Funds	\$ 33.5 MILLION	\$ 918 MILLION	+ 7.3 % in Corporate + 6.3% in Trust

Learning from Birth Through College:

The Foundation’s goal is that all students, especially those who face the greatest opportunity gaps, enter kindergarten ready to learn and graduate from high school prepared to succeed, with financial and other support to assist them in post-secondary education. We recognize that some children, families and school districts require additional and different supports to clear pathways to success. In 2016, our contributions to this effort included grants, technical assistance, learning networks and new collaborations to advance early childhood development, system building and family, school and community partnerships linked to child development and learning.

Early Childhood: We continued to partner with others to leverage public sector and other philanthropic dollars, to build a high-quality early childhood system, increase opportunities for family engagement and leadership and ensure that infants in all settings (center and home-based child care) are included in early childhood system building. Our work was impacted by budget cuts at the federal, state and municipal levels, changes in municipal and philanthropic focus on early childhood and the departures of the State Office of Early Childhood (OEC) Commissioner and the Director of the Hartford Office for Families, Children, Youth and Recreation.

EVALUATING OUR LEARNING INITIATIVES:

We continued to work with the Center for Policy and Assessment Development (CAPD) to track indicators our progress.

CAPD reports that our education strategy is proving essential to:

-  *building effective partnerships;*
-  *stimulating collaborative learning and action; and*
-  *creating key infrastructure for initial system development and practice changes.*

-  We continued to build collaborative efforts to impact the quality of home-based care for the approximately 600 infants and toddlers in this setting in our region. We leveraged resources from the OEC and others to provide training, supervision and certification for 65 child care providers, including home-based providers and home visitors, in East Hartford as a pilot strategy for increasing expertise around infant mental health. Based on research that we commissioned in 2015, we leveraged funding from a private foundation to support All our Kin, one of the nation’s premier organizations focused on home-based childcare, to better serve approximately 125 home-based providers who have the capacity to serve at least 500 infants and toddlers. Due to state budget cuts, we were unable to launch a second cohort of home-based providers to receive state dollars for small capital improvements in their homes under our Renovate to Educate pilot, however we continued to provide technical assistance and are working with OEC to track the initial 2015 cohort of eight providers in Bloomfield and Windsor.
-  We worked with the OEC to support the early childhood and family support workforce in our region, establishing the Capitol Region Alliance for Family Support and Engagement Providers to coordinate services and enhance the capacity of providers.

- ☉ We continued to leverage our dollars as co-chair and active member of the statewide Early Childhood Funders Collaborative to support an organizational assessment and recruitment of a quality improvement director at the OEC.
- ☉ We launched the Early Childhood Collaborative website and virtual learning network that provides research and proven practices at the local, regional, state and national level to help parents, providers and others in our region learn, share and work together to improve children’s outcomes.
- ☉ We maintained our support to six Brighter Futures Family Centers in Hartford as neighborhood hubs and innovation hubs to incubate and inform early childhood system building at the municipal level. Our grants extended Center programs into Hartford Public School Family Resource Centers, contributing to system building between these two critical resources.
- ☉ We worked with municipal leaders to create an Office for Young Children in Wethersfield, the second in the Hartford region (we worked with the City of Hartford to create the first office in 2005) and expanded the use of Early Development Instrument (EDI) and its related civic engagement activities to address children’s kindergarten readiness to East Hartford and Windsor.

Alliance District Initiative: We are helping to build new infrastructure for family, school and community partnerships and extended learning opportunities across six high-need school districts in our region as well as continuation of Community Schools work in the City of Hartford. The districts awarded planning and implementation grants leveraged the resources and support received from the Foundation with a combination of local boards of education, municipal, state, federal and private philanthropic dollars. This year, Foundation funds represented 24 to 38% of the total project costs for the districts. Our work includes helping to build the capacity of Alliance Districts to sustain family, school and community partnership independent of Foundation support.

- ☉ New cabinet-level Offices of Family and Community Engagement were created in six districts.
- ☉ We brought researchers and systems change experts to Greater Hartford to support a learning community among superintendents and their leadership teams and partners.
- ☉ Leveraging funds from the Ford Foundation, we contracted with education policy experts to analyze policy, funding streams and practices that support or pose barriers to high-quality family, school, community partnership to help the districts create sustainability plans for this work.

ALLIANCE DISTRICT INITIATIVE YEAR ONE ACCOMPLISHMENTS

Windsor Locks: *Hired Coordinator of Family and Community Engagement; established supports for personalized, mastery-based learning aimed at helping all prek-12 students achieve college, career and life readiness and developed the capacity of a core group of family and community partners to engage others in support of its vision.*

Vernon: *Created family, school, community team with strong parental representation that resulted in a district vision statement and new “Blueprint for Student Success” that includes partnership as a priority.*

Manchester: *Created Office of Family and Community Partnership; convened community advisory group that led to district goals for partnership in the district improvement plan; established family engagement as a priority for 11 district-run Family Resource Centers, including 5 new centers funded by the Foundation, created early childhood program aligned to the district’s k-3 curriculum; and organized events attended by more than 1200 residents to encourage student success as a shared community goal.*

Windsor: *Established Office of Family and Community Partnership; implemented new model for collaboration between teachers and parents to support student success, and piloted a teacher home visitation model.*

East Hartford: *Hired Coordinator of Family and Community Engagement, implemented dual capacity approach to engage educators and families, launched “Cultural Competency Study Circle” to eliminate barriers to African American and Latino student success; and created Teaching and Learning Center to coordinate child development and family engagement resources.*

Bloomfield: *Hired Coordinator of Extended Learning and Family and Community Engagement; launched summer and school-year pilot for district-wide extended learning; and developed approach to measure and support ongoing family engagement.*

-  The Community Schools currently reflects the Hartford Public Schools engagement in the Alliance District efforts, yet additional plans are anticipated with the new superintendent. The community school model, in partnership with the United Way, City of Hartford, and Hartford Public Schools, continues to be cited by the State Department of Education, Hartford Public Schools and others as a stabilizing force among Hartford public schools. This year, efforts were affected by leadership changes, budget cuts, student relocations and proposed school closures/consolidations.

Our investments in scholarships and career and life readiness programs are critical in closing the opportunity gap for children in our region.

-  We provided General Operating Support to strengthen the infrastructure and sustainability of youth-serving agencies to reach more underserved youth. Agencies support family, school, community partnership at three community schools, providing evidence-based youth development and family engagement supports, afterschool enrichment and workforce development to nearly 2,000 youth and families.
-  We invested in summer programs to help prevent summer learning loss and enhance literacy, two key components to reducing the education achievement gap. In 2016, more than 10,000 school-age youth in Greater Hartford participated in summer learning programs through \$790,000 in grants from the Foundation to support 57 programs, operated by 43 agencies.
-  We awarded more than \$1.4 million in support of new and renewed college scholarships to more than 640 traditional-aged students and adult learners at four-year and two-year colleges, as well as graduate and medical schools. We also launched a redesigned, online directory of college scholarships available to students in Greater Hartford, including more than 100 scholarships awarded by the Foundation.
-  We analyzed our Community College Scholarship Pilot Program, which provides aid to motivate students to complete degrees in less than three years, and found that students have not applied for the Community College Scholarship at high rates. In 2017, we will complete research to better understand this issue and explore possible actions, including links to our career pathways initiative.
-  The Foundation entered into an agreement to serve as fiscal agent for Hartford Promise, a scholarship program for graduates of Hartford Public Schools. We hold the scholarship funds at no fee and provide the staffing and systems to process individual scholarship payments at no charge. We currently hold approximately \$3.1 million in gifts and anticipate an additional \$500,000 by year-end. Distributions to the first group of 134 Hartford Promise Scholars is underway. We will continue to monitor the progress of this program and our role as fiscal agent.

EVALUATING OUR SCHOLARSHIP PROGRAM:

For the first time, we engaged the National Student Clearinghouse (NSC) in the scholarship program to collect outcome data on students' enrollment status and graduation rates.

NSC found that more than 70% of our scholarship recipients since 2012 achieved graduation.

We anticipate further research in 2017 to assess the impact of Foundation's scholarship on student persistence and academic success.

Family Economic Security:

The Foundation made progress toward its strategic goal that low-income, low-literate residents in our region have access to clear pathways to employment and career advancement that lead to economic security for their families. In addition to the Career Pathways Initiative (CPI) and other grantmaking, we leveraged our dollars to support two generational strategies and broaden access to career

pathways for underserved populations to improve family economic security for residents in the Greater Hartford region.

Since we launched the Career Pathways Initiative in December 2015, all nine collaboratives are fully staffed, and we convened two learning sessions and an evaluation session. Initial results include a new tool to assess partnership development and a new directory of workforce programs that serves as a much-needed referral resource for partnering agencies and the broader workforce field. In partnership with the collaboratives and an independent evaluator, we are developing an approach to assess progress toward attainment of job placement and education goals, effective partnership development and the creation of a regional, integrated career pathways system. The initial phase (April 2016-March 2017) will establish initiative and grantee level theories of change; build grantee evaluation capacity; develop evaluation frameworks and tools and capture emergent learning.

The Foundation continues to collaborate with the United Way of Central and Northeastern Connecticut, the City of Hartford, Hartford Opportunity Youth Collaborative and several area nonprofits to support the Hartford Generation Work project, an effort to align work and build capacity for partnership and collaboration among several established Hartford initiatives that seek to impact the economic security of young adults in Hartford. This leverages support from the Annie E. Casey Foundation (up to \$900,000).

Building on our advocacy efforts to achieve public sector commitment to a two generational approach that integrates services to low-income families with young children to enhance family economic security, we matched funds from the State and the Kellogg Foundation to develop 2gen hub sites in Hartford and East Hartford, serving 30 families.

We engaged with the AARP Foundation around a co-funding opportunity to bring its Back to Work 50+ initiative to the Greater Hartford region. Together, we held an innovation lab with 30 nonprofits, employers and donors to develop prototypes for programs. This work is likely to develop into a partnership in 2017 to build the capacity of community colleges and other nonprofit organizations in our region to support older workers.

Working with the Immigrant Strategic Funders Collaborative for Connecticut, which aims to enhance statewide and local efforts to help Connecticut's immigrant families achieve family economic security, we leveraged funding from the Open Societies Foundation to enable four organizations in our region to promote understanding and increase legal services to an

CAREER PATHWAYS INITIATIVE AT A GLANCE

\$3.95 million in unrestricted funds and \$560,000 in donor advised funds support nine collaborations that target residents with limited literacy and employment skills needing a broad range of coordinated services.

Requires partnerships and established a learning community among the adult literacy, community college, workforce development, support service providers and employers.

CPI projects include outreach to immigrants; single mothers; at-risk youth; low-income and unemployed residents in North Hartford, homeless individuals and returning offenders.

GRANTS SPOTLIGHT: FAMILY ECONOMIC SECURITY

Supported capacity building for entrepreneurs and small businesses.

Funded increased access to summer employment for Hartford youth.

Funded a collaborative effort to support workforce and career readiness for women in construction and licensed trades.

Leveraged resources from Asnuntuck Community College and the CT Department of Social Services to increase access for low-income students eligible for SNAP benefits to post-secondary certificate programs and employment in growing industries.

estimated 1,900 residents in our region impacted by the Deferred Action for Child Arrivals Executive Order.

Vibrant Communities:

In 2016, we provided funding and capacity building support to nonprofits and encouraged civic and community engagement and action vital to strong, safe and vibrant communities in our region.

- 🌀 Recognizing the important services that small agencies provide to support vibrant communities in our region, we launched the Small Agencies Project, which includes the *Building On Success* capacity building and grants program for twelve agencies that have budgets below \$200,000. Each agency received \$10,000 to strengthen their work and the program will run from September 2016 through September 2018. An independent evaluator will gather data on each of the program components and develop tools for ongoing learning and evaluation.
- 🌀 In response to state budget cuts, the Foundation surveyed grantees to collect their initial experiences and projections about the impact of the budget cuts. As a result, we committed \$1 million from our responsive grantmaking resources for Transitional Operating Support (TOS) grants to assist nonprofits that address critical human needs affected by unexpected losses of state funding. By the end of the year, we expect to exceed this allocation with grants to approximately 20 agencies totaling nearly \$1.4 million, mitigating reductions to emergency and supportive housing, health care and food security programs, and ensuring continuity of critical supports in our communities.
- 🌀 The Foundation’s Nonprofit Support Program (NSP) provided further support to a wide range of nonprofits through its high-quality capacity building programs. In response to market forces, NSP experienced increased requests for help with strategic planning, financial management and strategic alliances and mergers.
- 🌀 We hosted a statewide convening with Dr. Robert Putnam, internationally renowned scholar and author, highlighting how the growing opportunity gap affects children, families and communities, and how we can work together to close the gap. The event brought together more than 500 residents and 80 funders from across the state and included a workshop among 16 Connecticut community foundations and other funders to explore how philanthropy can leverage our unique roles to increase opportunity.
- 🌀 Building on the tremendous response to the Putnam event, violence and divisiveness across the country and our strategic goal to foster civic engagement, we launched a “Get Out the Vote” social media campaign, in collaboration with community foundations throughout Connecticut, as well as MetroHartford Alliance and the Connecticut Council for Philanthropy. The campaign encouraged residents to vote and provided ready access to voter registration information. The campaign reached more than 112,000 residents on social media and our Facebook followers increased 35% during the campaign. In 2017, we expect to build on this effort and our grantmaking to support civic engagement.
- 🌀 We continued to fund collaborative efforts to implement an integrated, coordinated system to end homelessness in our region. Building on our support to successful efforts last year to end homelessness among veterans, we awarded more than \$200,000 to help the Greater Hartford Region’s Coordinated Access Network (CAN) expand its systems change approach to address the homelessness of families with children

**GRANTS SPOTLIGHT:
CIVIC ENGAGEMENT**

Funded the 2016 State of Black Hartford to drive dialogue and action on issues affecting Black communities.

Supported training to develop parent leaders for regional 2Gen pilot and citizen input in the design and impact analysis of the many transit projects planned for the region.

Funded activities to promote nonprofit board leadership that reflect racial and ethnic diversity of communities served.

(the fastest growing segment of homeless) and young adults in Greater Hartford. We also awarded more than \$1 million to support a collaborative effort by six agencies that will continue and expand a range of services, as well as test new collective impact models, to address and prevent homelessness in the Capitol Region.

- Our health related grants supported the long-term stability of providers that effectively meet the broad health and mental health needs of low-income and underserved residents in our region. We mitigated state funding cuts to basic health needs providers and provided funding that allowed health providers working with underserved residents in the Greater Hartford region to plan and implement strategies for program sustainability.
- Our arts and culture grants funded capacity building to strengthen the infrastructure and sustainability of an array of programs that contribute to equitable access to the arts throughout the region.

We also worked with the region's nonprofits and our partners to determine the impact of budget cuts, particularly in the areas of critical human needs, and how the Foundation could assist this year, and as the fiscal crisis continues. As the City of Hartford faces acute fiscal challenges, we are working with municipal and community leaders and other funders to provide thought partnership, data and funding to better understand potential options.

GRANTS SPOTLIGHT: ARTS AND CULTURE

Funded key arts intermediary in the region to support Hartford events.

Supported efforts to create a more diverse and inclusive constituency for the importance of land stewardship in Greater Hartford communities.

We continued to identify and nurture collaborative opportunities to bring new resources to our region, leverage Foundation dollars and share data to inform and catalyze collective action to address complex challenges.

- The Foundation played a key role in the City of Hartford's application for the Promise Neighborhood 2016 Implementation Competition grant from the U.S. Department of Education (ranging from \$4 to \$6 million annually for up to five years) that seeks to ensure that all children growing up in Promise Neighborhoods have access to effective schools and strong systems of family and community support. Decisions are expected by the end of the year.
- We provided matching funds to help the City successfully receive \$125,000 to develop and implement a climate action plan from Partners for Places, a network of national funders that creates opportunities for cities to build partnerships between local government sustainability offices and place-based foundations. Foundation funds will support a sustainability director.
- We leveraged significant support from the U.S Department of Housing, the City of Hartford, banks and corporate funders for a key intermediary (LISC) to assemble and invest capital to increase the impact of community development in Hartford's neighborhoods and build the capacity of local organizations to plan and implement effective neighborhood revitalization strategies.
- We were instrumental in bringing the Working Cities Challenge (WCC) to Connecticut, an economic development effort by the Federal Reserve Bank of Boston (FRBB) that builds cross-sector collaboration and leadership to solve challenges in urban communities. Funding for the statewide competition will be provided by the State of Connecticut, which has committed \$1 million and an additional \$2 million commitment from statewide business and philanthropy and national partners. The FRBB will contribute data analysis and technical assistance. The Foundation served as a convener in introducing the opportunity to potential funders statewide was the first philanthropic funder to the WCC and we serve on the Steering Committee that set the criteria for the Connecticut competition. The competition was

officially launched in October with Hartford, East Hartford and Manchester eligible to apply from the Greater Hartford region. Design grants will be announced in March 2017 and implementation grants will be awarded in January 2018.

- Working with our partners, we published and disseminated 2016 Metro Hartford Progress Points, building greater understanding about issues facing the entire region, including the impact on the Capitol City. In December, we convened the project's partners to lay the groundwork for re-imagining Progress Points in 2017, exploring ways to act on the data and identify deeper analysis that can advance regional solutions.

Using Our Strategies Across Our Priority Areas

Recognizing that our priority areas are interrelated, we employed five strategies to leverage our assets across the priority areas, bringing leadership and supporting multi-sector collaborations.

Invest in the Region

The Foundation has continued to be a sought-after resource for capacity building to the region's nonprofits in all sectors and examined new ways to address our region's most pressing needs.

- The Foundation's Nonprofit Support Program awarded \$1.9 million in grants to 78 organizations and served approximately 1,060 individuals and 225 organizations through a variety of workshops including evaluation, financial management and technology as well as providing consultants with state-of-the-art information. Nineteen agencies participated in the Building Evaluation Capacity (BEC) conference to learn from evaluation findings of five BEC Alumni Group agencies as well as initial evaluation designs presented by the fourteen agencies currently enrolled in the 18-month BEC program that is scheduled to conclude in June 2017.
- We launched a series focused on helping local agencies build endowments with national expert, Kathryn Miree, for more than 200 community leaders, nonprofits and donors.
- To generate new solutions to the region's challenges, we released a request for proposals for the Community Innovation Fund to select agencies in our region to address community issues in new, creative, or original ways through collaborative action and a systems lens. We received 26 applications, and we awarded approximately \$300,000 for seven planning grants.
- We completed research on impact investing from a policy, investment and grantmaking perspective that was shared with the Board, which approved ongoing exploration in 2017.

NSP: EVALUATION FINDINGS

NSP continues to be effective and have meaningful impact on the region's nonprofits.

More than 90% of nonprofits interviewed for the evaluation reported measurable organizational change as a result of participating in NSP programs.

NSP plays a critical role in advancing the Foundation's strategies.

NSP will implement recommendations in 2017 to enhance coordination of programs and provide the next level of learning and analysis on a range of capacity areas.

Build, Sustain and Share Knowledge

Throughout 2016, we sponsored and shared new research to inform our strategic decision-making and to cultivate a shared understanding of regional issues among donors, nonprofits, community leaders and residents.

- 🌀 We created new learning communities in our Early Childhood, Alliance District and Career Pathways Initiatives.
- 🌀 We offered donors new opportunities to learn firsthand about the region and local communities and align their charitable interests with our strategic goals.
- 🌀 We identified gaps in knowledge and completed research to help inform our strategy planning and decision making including research on definitions and approaches to equity and the impact of school consolidations on students.
- 🌀 We contributed to greater understanding about the municipal fiscal challenges. The Foundation’s Community Indicators Project Director co-authored an article that was published in the CT Mirror to explain about the barriers to raising revenue for cities like Hartford, assisted the Hartford Office of the Mayor in analyzing municipal and regional data to help inform the City’s planning and shared similar data with the other municipalities in the Greater Hartford region.
- 🌀 We hosted a series of conversations with municipal and state policymakers, community leaders, nonprofits and academic institutions to explore models for developing and coordinating research that could inform policy.

CONVENING TO BUILD AND SHARE KNOWLEDGE:

180 grantees convened to learn about leadership for collective impact as a strategy to promote collaboration in developing community solutions with national expert, Paul Schmitz.

76 donors attended the first joint Giving Circle meeting to learn about the findings from the 2015 Metro Hartford Progress Points that resulted in members asking for ongoing opportunities to learn together. We also convened each Giving Circle to learn about their chosen topics with statewide experts.

24 guests, including donors, prospective donors, business owners and non-profits, attended a well-received community conversation in Manchester to learn about the Foundation and the needs of the region and Manchester community. Planning is underway for additional community meetings in 2017.

This year, we kept the Board informed about our progress through quarterly dashboards, dialogue with the Board Policy and Strategy Committee and the full Board as well as grant requests that highlight how each grant advances our strategic goals. We completed research on learning and evaluation trends in the philanthropic field and identified our current building blocks and challenges for this work. We found that learning, evaluation, knowledge management and effective public policy engagement are inextricably entwined. As part of this effort, we completed an organization-wide data inventory that confirmed that we collect an array of information, but need a coordinated approach and effective technology platform to capture and use the information to guide decision-making and assess our impact. We expect implementation of organization-wide learning and evaluation to be a focus of our work in 2017.

Engage in Public Policy

Our public policy efforts focused on administrative and legislative advocacy at the federal, state and municipal levels to improve equitable opportunity in our priority areas for residents in our region. We were challenged as the state and municipalities grappled with closing a nearly billion-dollar budget gap, which resulted in substantial cuts to a wide range of education and health and human services.

Reflecting on the three years since the Board approved the Foundation’s advocacy policy, we found that advocacy is a critical tool to advance and sustain our strategic goals, but that increased organizational capacities are necessary to amplify our impact in this area. We need dedicated staff time, resources, and solid data about critical issues in our region and efforts to address them, to inform policymakers about the allocation of limited resources and the appropriate role of community foundations in times of fiscal crises. Despite these challenges, we made progress by engaging policymakers at the federal, state and municipal levels in opportunities to co-invest and embed our thought partnership in their planning and decision making.

- Our advocacy to integrate high-quality home-based care in broader early childhood system building efforts and policy brought new resources to our region including state dollars for improving quality of home-based child care; a formal link to the statewide Diaper Bank; new bilingual child development curriculum trainers; and an invitation by the OEC for thought partnership to respond to a new federal grant focused on home-based care. We also provided testimony before the State Education Committee to share our learning related to critical components for early childhood accreditation support in Connecticut.
- We aligned our early childhood and K-12 work to help the State Department of Education (SDE) better understand the link between student success, early childhood system building and family, school, community partnership. SDE has expressed interest in learning from our work and invited Foundation staff as a critical thought partner in executing the federal Every Student Succeeds Act (ESSA). The Foundation’s K-12 director was asked to serve on the SDE Commissioner’s new Roundtable for Family and Community Engagement and both the Early Childhood and K-12 Directors contributed to SDE’s ESSA focus groups. At the federal level, the Foundation was one of 26 signatories to a letter to the U.S. Acting Secretary of Education, urging the adoption of regulations under ESSA that promote equity, including community schools and family-school-community partnership, and we met with the Secretary of Education, along with 30 other funders, to discuss the roles that philanthropy can play to implement ESSA.
- The Director of Early Childhood Investments served on the Two Generational Interagency Workgroup tasked with designing a RFP for 2gen pilots statewide that resulted in a pilot in the Greater Hartford region.
- We shared our work with the Commissioners of Labor and Correction to explore possible partnerships around workforce issues and both leaders participated in our career pathways convenings. Our Community Indicators Project Director and a Senior Program Officer were invited to serve on the CT Employment Training Commission Committees comprised of state agencies, employers, workforce development boards, organized labor and philanthropy, charged with making recommendations for programmatic support and policy to improve career pathway development.
- We are building on the 2015 Progress Points forums through administrative advocacy with the Departments of Transportation (building resident engagement around transportation changes); Correction (raising awareness among employers about hiring former offenders); and the Office of Policy and Management (developing infrastructure to coordinate research to inform state policy).
- We assessed the impact of two pilot public policy grants to nonprofits for administrative advocacy for at-risk students. The grants tap the significant subject matter expertise and state agency relationships held by each organization to support and advance the Foundation’s goal to ensure that

2016 PUBLIC POLICY PRIORITIES

Infants and toddlers (age birth to three) in our region have equitable opportunity for high-quality early childhood experiences, with a focus on home based childcare settings where the majority of infants and toddlers in our region grow and learn.

Sustainable public commitment to family, school, community partnership as a means to promote equitable opportunity for student learning and achievement.

Two-generation approach to improving child and family outcomes for low-income families in our region through quality early childhood experiences for children, pathways to work for parents and related support services.

Sustainable public commitment to integrated, regional career pathways and appropriate supports in our region for low-literate, low-income adults as a means to promote equitable opportunity for family economic security.

Sustainable public resources and policies that put data into action to advance local and regional solutions.

Public policy grantmaking aligned with our priority policy issues.

Federal policy issues that may significantly impact the philanthropic field and our priority policy areas.

all children are ready to learn and succeed in school and life. We shared the lessons learned with the Board Policy and Strategy Committee and expect to expand grantmaking in this area in the next year.

- ☉ We created a two-year Policy and Philanthropy Fellowship that expands the capacity of CT Voices for Children and the Foundation to engage in policy research, analysis and advocacy that advance our overlapping priorities and maximize the role of philanthropy in the policy arena. The fellowship is the first in the state to link advocacy and philanthropy to educate and influence policymakers.
- ☉ We submitted a letter to Congressman Larson to encourage his support for the *Grow Philanthropy Act of 2016* that would expand the IRA charitable rollover to allow for contributions to donor advised funds, giving residents in our region, and all Americans, more flexibility to fulfill their charitable interests.

Inspire Philanthropy and Steward Resources

In 2016, our donor development and engagement efforts along with our communications and marketing strategy focused on growing and leveraging our assets, enhancing donor and professional advisor stewardship and deepening awareness and understanding of the Foundation and philanthropy.

- ☉ We engaged in more deliberate cultivation with private foundations for conversions to designated funds at the Foundation and co-funding on grantmaking, and we pursued outreach to businesses for current use projects and donor advised funds.
- ☉ We implemented a tracking system to assess our cultivation progress for new gifts and new donors. Our Giving Circles engaged in learning opportunities to align their grantmaking with our priority areas and our organizational endowment building program for nonprofits resulted in four donor designated funds for nonprofits, showing great promise for future growth.
- ☉ We launched two efforts to increase donor interest and encourage giving: our “Road to Giving” videos feature interviews with donors sharing how they became involved in philanthropy and our 2016 “I am a Philanthropist” ad campaign invited a diverse group of donors to promote opportunities for philanthropy at the Foundation.
- ☉ We developed strategic plan and “Foundation Essentials” brochures and updated our website to reflect our strategic goals. More than 50 media releases and 135 stories were published through a variety of local, state and national print, digital and social media that brought our work to life, using our communications to highlight staff as experts in their fields.
- ☉ Working with the Board Development Committee, we established a Board of Ambassadors to engage community leaders and other residents in understanding and promoting our work and serve as a pipeline for new donors and leaders. Fifty-two Ambassadors met for the first time this fall to learn from a panel about the findings in the 2016 Progress Points and the Foundation’s education and career pathway initiatives.

CONNECTING DONORS TO OUR PRIORITIES:

Newton C. and Elsie B. Brainard Fund: *Pays medical bills and alleviates financial stress and crisis for Greater Hartford residents of moderate means with serious or chronic illness. An Advisory Committee comprised of Brainard family, Foundation Board members, physicians, and health policy experts, expects to award more than \$240,000 in 2016.*

Auerbach Family Fund: *Between 2015-2016 expected to award \$560,00 to support the Career Pathways and approximately \$400,000 in basic human needs grants.*

Garmany Fund and the Stanley D. and Hinda N. Fisher Fund: *Awarded more than \$1million to nonprofits closely aligned with building vibrant communities.*

Investment Portfolio: A few strategic changes were made to the roster of the professional investment managers hired to invest a portion of the Foundation's endowment including upgrading to a well-managed portfolio overseen by a seasoned team with a more favorable fee structure and seizing new opportunities to invest with two firms that had been closed to new investors for a number of years. After nearly two decades, we transferred custody of the invested assets held in HFPG, Inc. from BNY Mellon to Northern Trust due to service concerns. To date, we have been highly satisfied with Northern Trust's service and benefited from enhanced transactional and reporting efficiency.

Our efforts to inspire philanthropy were impacted by staff transitions in the development department, as well as the uncertain financial and political climate. Throughout 2016, donors were more hesitant to make gifts, but we have begun to experience an uptick in donations since the elections. Next year, we expect to use data and technology more effectively as we move to a new technology platform, amplify our efforts to cultivate relationships with professional advisors to encourage client referrals and create current use funds to proactively align donor interest with our priority areas. We are exploring best practices among our philanthropic peers to create funds that allow donors to support our strategic activities.

Build Our Organizational Capacity

To support our strategic goals, we identified and created processes and capacities within the Foundation to work more collaboratively and effectively internally and externally, enable continuous learning and assessment of our work and ensure smooth transitions in leadership and staff. We explored our technology needs and options for a new technology platform tools to manage our grants, gifts and accounting and enable more robust evaluation and information management. We expect to identify a new provider in 2017. We are also excited that the Board approved a lease at our current location that will accommodate current staff needs, future growth for the Foundation and serve the community. We have begun renovations that increase our space by approximately 5,300 square feet that will include a new state-of-the-art conference center for staff and community convenings.

Moving Forward in 2017

Looking ahead, we carry forward our learning from 2016 and reaffirm a commitment to our core value, including equity, inclusion and diversity, as guideposts for our work. We will continue to meet the highest fiduciary standards in our grantmaking, gift and funds management, and financial operations and investments and advance our strategic priorities while being responsive to learning, new ideas and fiscal and policy changes that impact the people and places with greatest need in the region.

MEETING THE HIGHEST STANDARDS:

We updated our policies and documents to complete the application to the National Standards Board for U.S. Community Foundations for re-accreditation of our standing as a community foundation with the operational effectiveness to foster excellence in community philanthropy.

We were among the first community foundations to achieve this designation in 2006.

We are developing new data privacy and protection policy and practice, which reflect trends in the philanthropic field and our anticipated data collection and analysis activity under the strategic plan.

FOUR STAR RATING FROM CHARITY NAVIGATOR:

We received the highest possible rating for its strong financial health and commitment to accountability and transparency from the nonprofit sector's leading evaluator of U.S. charities.

Only approximately 25% of organizations evaluated by Charity Navigator have attained this level of distinction.