



THE JIMMY CARROLL
FOUNDATION

JIMMY CARROLL FOUNDATION

STRATEGIC
FRAMEWORK

2024-2027

PREPARED BY
UF STRATEGIES LLC





TABLE OF CONTENTS

Executive Summary	03
Our Story	04
Our Target Area	05
Our North Star	06
Our Values	07
Our Strategic Priorities	08
Our Approach	09
Our Path Forward	15
Our Leadership Team	16

EXECUTIVE SUMMARY

In June 2023, the Jimmy Carroll Foundation (JCF) initiated a comprehensive six-month strategic planning endeavor in collaboration with UF Strategies LLC. The primary objectives of this initiative were to evaluate the organization's current state, review its mission, vision, and values for clarity and alignment, and establish a strategic framework to guide JCF's endeavors over the next three to five years.

To facilitate this process, a series of crucial activities were undertaken - an environmental scan, SWOT analysis, interviews with partner organizations, a board member survey, and dedicated strategy sessions.

This executive summary encapsulates the outcomes of these activities, synthesizing the gathered insights to provide a strategic roadmap for JCF. The identified strategic priorities aim to fortify the organization's impact and enhance its capacity to fulfill its mission.

The strategic roadmap outlined in this report encompasses key focus areas, including refining the mission and vision statements, enhancing organizational values, optimizing collaboration with partner organizations, and fortifying internal capacities.

As JCF moves forward, this strategic plan provides a clear and actionable guide for improved decision-making, resource allocation, and organizational development, positioning JCF for sustained success and enabling the foundation to effectively pursue its mission over the coming years.

However, it is important to note that strategy must be agile and flexible if it is to serve the organization well. JCF must continuously evaluate whether these priorities and correlating goals remain relevant and timely as it pursues its work within the context of internal and external environmental changes. As such, the anticipated completion of activities should be considered a guidepost rather than a mandate.

MISSION

JCF exists to tangibly display love and justice to those who are often overlooked and marginalized.

VISION

JCF's desire is for marginalized people in the greater Wake County area to experience grace and compassion, along with an understanding that they are loved and seen through physical and emotional care.

VALUES

- Visibility
- Acknowledgment
- Longevity
- Equity
- Dignity
- Open-Mindedness

PRIORITIES

- Strengthen infrastructure and organizational capacity.
- Create high-engagement partnerships that impact the community.

“Strategic planning is more than a strategy; it is a process that produces a product — a strategic plan — that puts meat on the strategy and points the way to implementing it.”

— Michael J. Worth

OUR STORY

The Jimmy Carroll Foundation (JCF) was formed to build on the legacy of Jimmy Carroll. Jimmy lived out God's love and justice by identifying and engaging with people in the margins. His heart was broken by the apathy and indifference shown toward these individuals by both Christians and the community at large. He believed that God sees the overlooked and He cares (Genesis 16:13) and that His mission was bringing ALL men and women to Him. He also believed that the responsibility to carry out that mission sits in the lap of those who have been the recipients of His grace and mercy, His followers.

As such, JCF was formally organized in 2021 with the aim of partnering with organizations that are addressing social disparities and fulfilling practical needs for often overlooked and marginalized people in Raleigh and greater Wake County. These needs span a range of critical areas, including food insecurity, human trafficking, long-term illness, homelessness, clothing, education, employment sustainability, and mental health. JCF is committed to ensuring that Jimmy's vision continues by providing tangible gifts to those who seek to help those who need it most. These partnerships are not solely financial; we also contribute goods and committed volunteer hours.

KEY HIGHLIGHTS

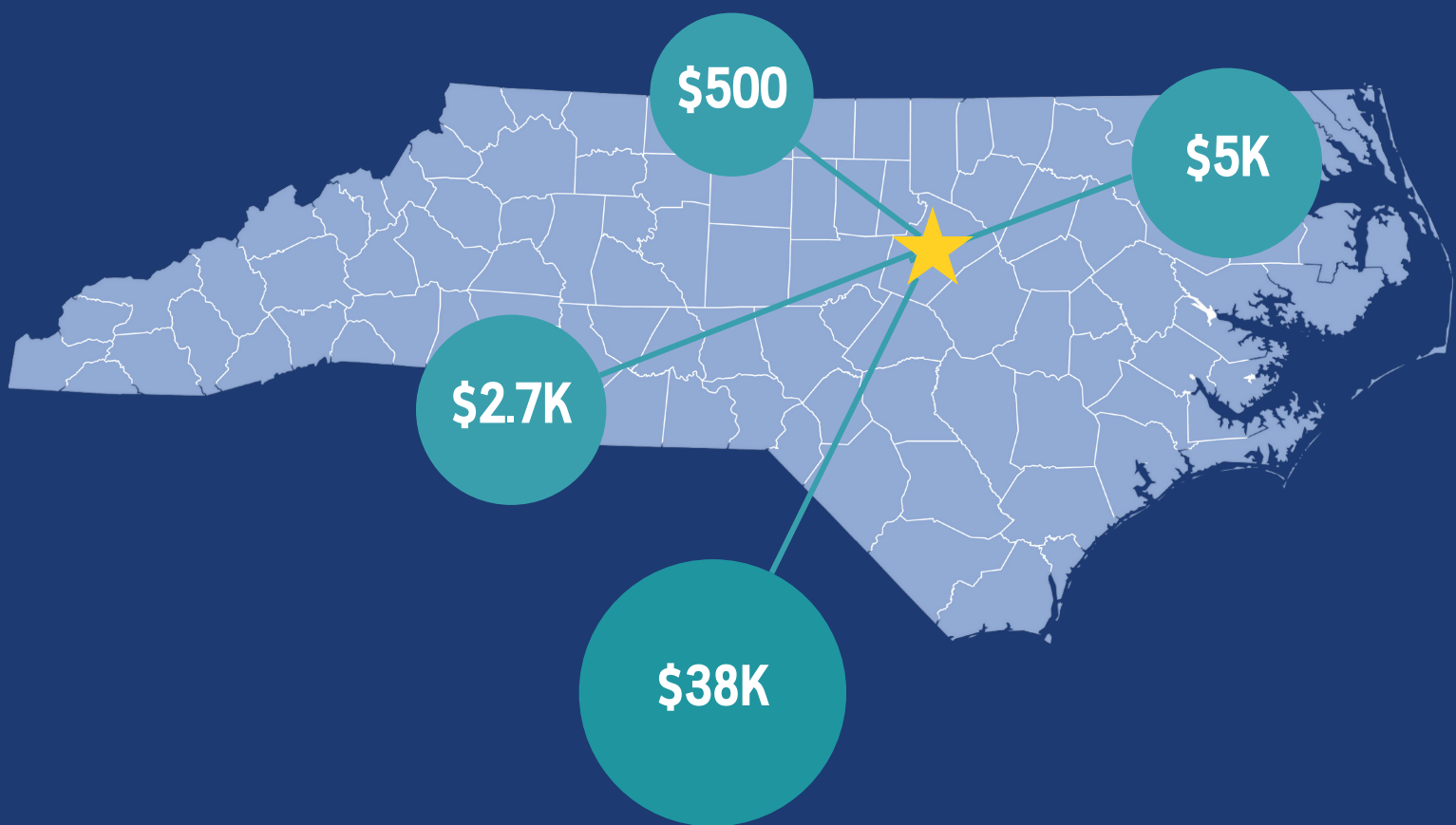
Over the past year we have achieved significant milestones that have propelled us toward greater success and community impact:

- Added a Board of Directors, bringing diverse expertise and perspectives to guide our mission.
- Recruited a dynamic Executive Director, whose leadership has infused new energy into our initiatives.
- Participated in a series of events hosted by our valued community partners, fostering meaningful connections and collaborations.
- Hosted a highly successful golf tournament fundraiser, showcasing our ability to mobilize support and generate resources for the work we do.



OUR TARGET AREA

We believe in the power of collective impact and are dedicated to creating lasting change in our community, the greater Wake County area. In 2023 alone, we committed over **\$46,000** in grant funding to partner organizations.



2023 IMPACT REVIEW

Partner Organizations:

- Ship Community Outreach
- A Place at the Table
- Duke Pediatric Transplant and Cellular Therapy (PTCT)
- Duke Raleigh Cancer Center



OUR **NORTH STAR**


Mission

The mission of the Jimmy Carroll Foundation (JCF) is to tangibly display love and justice to those who are often overlooked and marginalized. We believe that by directly addressing social disparities and practical needs, we can make a significant impact in the lives of many in Raleigh and greater Wake County.

Through partnerships and collective action, we aim to fill the gaps in various crucial areas. At JCF, our mission is not merely a statement, but a commitment to put our words into action, to contribute more than just finances, and to offer our time and resources in service of our community. We exist to ensure that the vision of Jimmy Carroll continues to make a difference, one tangible act of love and justice at a time.

Vision

The Jimmy Carroll Foundation (JCF) envisions a future where marginalized individuals across the greater Wake County area experience grace, compassion, and the profound understanding that they are loved and seen through physical and emotional care.



OUR VALUES

The Jimmy Carroll Foundation (JCF) is guided by a set of values that reflect our commitment to the marginalized and overlooked individuals in our community.



Visibility. Intentionally look for the needs and listen to the heart of marginalized people.



Acknowledgment. Identify and take responsibility for the social disparity that exists among all people.



Longevity. Immersively stay in the lives of the overlooked.



Equality. Promote parity among all people regardless of class, gender, age, orientation, or race.



Dignity. Embrace the physical and emotional needs of overlooked people.



Open-Mindedness. Extend unprejudiced love to all people.

OUR STRATEGIC PRIORITIES

Over the next three to five years, JCF will focus on implementing its mission and vision through two overarching strategic priority areas focused on fostering sustainable growth and positive social change. JCF aims to enhance the overall efficiency of its operations through the adoption of innovative tools and systems to optimize workflow. Simultaneously, JCF will prioritize the creation of high-engagement partnerships as a pivotal strategy to extend its community impact.

This comprehensive approach reflects JCF's dedication to not only fortifying its internal capabilities but also leveraging external partnerships to amplify its positive influence on the community. Through these strategic priorities, JCF aspires to be a catalyst for positive transformation,

01 — **Strengthen infrastructure and organizational capacity.**

We will invest in our people and systems as well as training to increase our operational efficiency. We will also focus on developing our internal processes and procedures to ensure they are streamlined and effective. Our goal is to create a strong foundation that will support our growth and enable us to better serve our partners.

02 — **Create high-engagement partnerships that impact the community.**

We will cultivate high-engagement partnerships with organizations that share our desire to create a substantial, positive impact on the community we serve. We will foster these relationships through regular communication, project collaboration, and shared learning opportunities. Our goal is to create synergistic relationships as we believe that together, we can achieve more.

OUR APPROACH

Strategic Priority 01

Goal 1 - Develop Operating Policies, Processes, and Procedures

We aim to develop comprehensive operating policies, processes, and procedures. To ensure our mission, vision, and values (M/V/V) align with our operational objectives, we will refine and finalize them. We will also develop an employee handbook to foster a harmonious working environment and guide staff behaviors.

ACTION ITEM

Refine and finalize mission, vision, and values.

ACTION ITEM

Develop an employee handbook.

ACTION ITEM

Determine executive decision and spending limits.

ACTION ITEM

Develop a grant management and award process to streamline applications.

Goal 2 - Enhance Overall Institutional Capacity

Strategic
Priority 01

To further boost our overall institutional capacity, we will formulate a comprehensive professional development plan for staff, provide board development training opportunities on a consistent basis, and create a board manual to streamline the onboarding process and better orient new board members to the organization.

ACTION ITEM

Create a professional development plan for staff.

ACTION ITEM

Provide board development training opportunities (three times per year).

ACTION ITEM

Develop a board manual and robust onboarding process.

Strategic Priority 01

Goal 3 - Implement a Fund Development and Investment Framework

In an effort to ensure sustainability, we will develop a robust fund development framework. We plan to bring in expertise by hiring a reputable fund development consulting firm and adopt a well-researched fund development and investment strategy .

ACTION ITEM

Vet and hire a fund development consulting firm to guide the process.

ACTION ITEM

Adopt a fund development strategy to increase the Foundation's giving ability and sustainability.

ACTION ITEM

Develop an investment policy, addressing various financial scenarios and guiding the organization's investments.

OUR APPROACH

Strategic Priority 02

Goal 1 - Develop Partnership Engagement Strategy

We aspire to formulate a strategic plan for engaging our partners. This not only entails defining what we term as 'high engagement partnership' but also determining the partnership criteria. We will also host informational gatherings and sharing sessions which serve as a platform for open dialogue and mutual brainstorming.

ACTION ITEM

Host information gathering and sharing sessions.

ACTION ITEM

Determine partnership criteria.

ACTION ITEM

Define high-engagement partnership.

ACTION ITEM

Identify potential partners.

Goal 2 - Increase Volunteer Engagement

Strategic
Priority 02

To further build on our volunteer engagement efforts, we will create a quarterly calendar of partner events and engage a marketing firm to amplify visibility and awareness of JCF. Additionally, we aim to develop a volunteer database pool of up to 50 potential volunteers.

ACTION ITEM

Develop quarterly calendar of partner events.

ACTION ITEM

Engage a marketing firm to increase awareness of JCF.

ACTION ITEM

Develop volunteer database pool of up to 50 potential volunteers.

**Strategic
Priority 02**

**Goal 3 - Increase Board
Engagement with Partners**

We will enhance our board's interaction with our partners. We aim to evaluate the board's availability to ensure at least one member can attend partner events, fostering stronger relationships and mutual support.

ACTION ITEM

Assess board member availability to have at least one (1) board member represented at all partner events.

ACTION ITEM

Develop a robust communication plan that includes regular updates, social media posts, and relevant information for the board.

OUR PATH FORWARD



● **By March 2024: Operating Policies, Processes, and Procedures Adopted**

The successful realization of this objective will be evident through two key indicators: operational efficiency and resource utilization. The streamlined processes should lead to cost-effectiveness and increased productivity, crucial for a lean team.

● **By September 2024: Overall Institutional Capacity Enhanced**

The attainment of this goal will result in strengthened internal capabilities and is poised to have a cascading effect on our governance framework, fostering transparency, accountability, and a culture of continuous improvement.

● **By June 2025: Fund Development and Investment Framework Implemented**

Implementation of this goal will include an expanded range of funding opportunities, encompassing grants, donations, and strategic partnerships with investors. Diversifying revenue streams should reduce dependence on the foundation's current singular funding source, fostering financial resilience, simultaneously elevating the decision-making process.

● **By December 2025: Partnership Engagement Strategy in Full Swing**

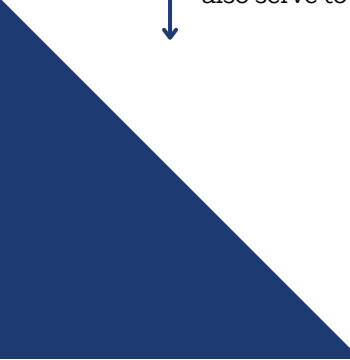
The successful completion of this goal is pivotal for JCF as it will allow for deepened partnerships that go beyond transactional relationships in service to meeting the needs of those in the community as well as ensuring the continued legacy of Jimmy Carroll.

● **By March 2026: Volunteer Engagement Increased**

Similarly, achieving this goal will result in positive outcomes such as bringing about a surge in organizational capacity, as more individuals contribute their time, skills, and passion to the cause. This influx of volunteers may also lead to the successful execution of a broader range of initiatives and projects, where JCF will be more visible in the community.

● **By December 2026: Board Member Engagement with Partners Increased**

Successful implementation of this goal will result in enhanced relationships with partners and stakeholders. Board members participating in partner events should provide a deeper understanding of the organization's goals, contributing to more meaningful collaborations. This increased engagement may also serve to elevate the organization's profile.



OUR LEADERSHIP TEAM



Jenn Hamilton, Executive Director

Board of Directors



Beverly
Carroll



Austin
Carroll



Jarret
Hamilton



Rachael
Waldman Klayman