

## **YEAR 1 2023**

### **Strategy #1: Strengthen Our Value Proposition**

#### **Objectives:**

**Evaluate our current programming to ensure it is high value / high profitability.**

#### **Action Steps:**

- 1) Create a Matrix Map that assesses programming value / profitability, highlighting discrepancies between focus group feedback and numerical data. (within this map, focus on our different member segments: corporate, private, and family foundations, and individual philanthropists).
- 2) Compile a list of high-value / high-profitability programs and activities and examine how we might enhance them to make them greater value for our members/ higher profitability.
- 3) Compile a list of low value / low profitability programs and activities and examine how we might change them to make them high value / high profitability.
- 4) Eliminate programs and activities that cannot be transformed into high value / high profitability programs.
- 5) Review Education Affinity Group and how to enhance and deepen value and impact.
- 6) Review and Enhance Conferences for members, delivering value and what they need.

**Work with national philanthropy serving organizations (PSO), regional and state PSOs to create partnerships to engage in rural places and/or lift WV's visibility as a place to invest and explore.**

#### **Action Steps:**

- 1) Identify and co-host programming and knowledge sharing with state, regional, and national PSOs.

**Reposition our branding to emphasize our role as a philanthropic leader in a state with power and potential.**

#### **Action Steps:**

- 1) Write a Communications and Marketing Plan (editorial calendar / evergreen blogs) with clarity on newsletter objectives (through this, we can share a consistent voice).
- 2) Review and revise the communications style guide.
- 3) Promote and advance public-private-philanthropic-policy partnerships from national to state to local levels that bring resources, opportunities, and equitable access to all West Virginians. (Examples: Give to WV initiative / Ascendium).

## **Strategy #2: Advance our values and commitment to cultivating abundance**

### **Objectives:**

**Move our mindset (and the field) to cultivate abundance within Philanthropy.**

#### **Action Steps:**

- 1) Create and adopt a state and federal policy agenda.
- 2) Promote, advocate, and build upon public policy and programmatic opportunities that put West Virginia on a track of growth and thriving, such as the Come Home Award, leveraging Federal funds, and creating statewide policy coalitions.

**Create and model collaborations that advance our mission, vision, and values among philanthropy, nonprofits, business, government, and citizens**

#### **Action Steps:**

- 1) Develop and pursue sponsorships and grants for sustainable support of the organization.
- 2) Opioid Settlement Funding - explore our role and offer services.

## **Strategy #3: Strengthen Internal Operations**

**To create a thriving culture within the organization.**

#### **Action Steps:**

- 1) Build a cohesive and high-functioning staff team, focusing on long-term staff retention.
- 2) Ensure opportunities for targeted staff professional development to build expertise and knowledge.
- 3) Update personnel policies based on best practices in human resource management.
- 4) Find new office space that better meets the organization's needs.

## **YEAR 2 2024**

### **Strategy #1: Strengthen Our Value Proposition**

#### **Objectives:**

**Evaluate our current programming to ensure it is of high value / high profitability.**

#### **Action Steps:**

- 1) Continue to evaluate and enhance programs for each segment of the member population.
- 2) Eliminate programs and activities that cannot be transformed into high-value / high-profitability programs.
- 3) Evaluate and launch PWV consulting services for the sector within the state and region.
- 4) Cultivate and Develop new Affinity Groups, if needed.

- 5) Develop and deliver programming to help build members' capacity on DEIB.

**Work with national philanthropy serving organizations (PSO), regional and state PSOs to create partnerships to engage in rural places and/or lift WV's visibility as a place to invest and explore.**

**Action Steps:**

- 1) Model Alaska's and Colorado Funders Tour into Philanthropy WV Tour
- 2) Continue to partner with regional PSOs to offer co-sponsored learning opportunities.

**Enhance and leverage our influence as the authority on understanding and transforming rural communities.**

**Action Steps:**

- 1) Advocate for the broad understanding of rural philanthropy at the local, state, and national levels.
- 2) Submit RFPs to speak at regional and national conferences about transforming rural communities. (this will help us elevate our presence).
- 3) Actively work to bring new voices to the table in philanthropy by developing young philanthropists and underrepresented individuals and groups.

## **Strategy #2: Advance our values and commitment to cultivating abundance**

**Objectives:**

**Move our mindset (and the field) to cultivate abundance within Philanthropy.**

**Action Steps:**

- 1) Evaluate policy agenda and update if necessary
- 2) Promote, advocate, and build upon public policy and programmatic opportunities that put West Virginia on a track of growth and thriving, such as the Come Home Award, leveraging ARPA funds, and creating statewide policy coalitions.
- 3) Track and identify opportunities for more robust public policy engagement, priorities, and collaborations that increase resources and opportunities for all citizens.

**Create and model collaborations that advance our mission, vision, and values among philanthropy, nonprofits, business, government, and citizens.**

**Action Steps:**

- 1) Create opportunities that grow the resources and increase WV's successes (ex. Statewide match fund to secure federal grants and national foundation dollars in partnership with state government).

## Philanthropy West Virginia Strategic Work Plan 2023-2025

- 2) Track and evaluate the smart growth of this work to identify what is fit for our mission and other partnerships that could better manage the work.
- 3) Continue to develop and pursue sponsorships and grants for sustainable support of the organization.

**Serve as a resource for individuals and organizations interested and involved in philanthropy.**

**Action Steps:**

- 1) Create resource guides that share how individuals and companies can give back to their communities (see Council of Michigan Foundations guides as samples).
- 2) Develop and expand consulting services to include meetings with philanthropic advisors (e.g., lawyers, financial planners) and their clients to discuss the landscape of philanthropy in West Virginia, opportunities to make a larger impact, etc.
- 3) Federal Funders Resources - Hub for State.

### **Strategy #3: Strengthen Internal Operations**

**To create a thriving culture within the organization.**

**Action Steps:**

- 1) Ensure opportunities for targeted staff professional development to build expertise and knowledge.