



Strategic Plan

Cultivating Abundance and Harvesting Opportunities

2022 – 2026

Strategic Framework

In 2017, Philanthropy West Virginia adopted a strategic framework titled “Meaningful Action: Learning, Leveraging, and Leading.” While five years have passed since the creation of that framework, Philanthropy West Virginia remains committed to those principles of meaningful action and reaffirms its mission, vision, and values. 2023 marks our 30th anniversary and it is a unique opportunity to celebrate, advance, and take our work to the next level.

Mission: Strengthening Philanthropy in the Mountain State

Vision: West Virginia has thriving communities due, in part, to a strong and vibrant philanthropic sector.

Values

- ◆ **Leadership** – we use our influence to maximize the resources and efforts of philanthropically-minded individuals and organizations to cultivate abundance.
- ◆ **Collaboration** – we listen to and evolve with our members, stakeholders and partners, helping and supporting each other in pursuit of our collective goals.
- ◆ **Inclusion** – we apply the “love of humanity” in our work and embrace our responsibility to reveal inequity, to reflect on our practices and our role in creating inclusive communities, and to recalibrate our activities to ensure we involve and empower all people.
- ◆ **Lifelong Learning** – we are eager to understand other people’s perspectives, we ask for feedback, we learn from our experiences, and we have the courage to adapt and innovate knowing effective philanthropy requires constant learning by board members, staff, and donors.
- ◆ **Integrity** – we speak and act with unwavering candor, honesty, vulnerability, and respect.
- ◆ **Advancing West Virginia** – we believe in our fellow West Virginians and work side-by-side with them to create a brighter future for all people.

[MEMBERS* are those foundations, corporations, organizations, and individuals who annually make a members investment to be an official Philanthropy WV member; PARTNERS* include nonprofits, peer organizations, businesses/private sector, government, and non-members who Philanthropy WV engages in particular work, priorities, and partnerships when possible; and Stakeholders = community members and leaders and other constituencies not outlined in the partner or member categories.]

***Our Value Proposition:**

Philanthropy West Virginia is the philanthropic leadership organization serving West Virginia and neighboring communities. We provide continuous expert content, connections, collaborations, and contributions for all foundations, corporations, organizations, and individuals based and/or engaging in

grantmaking. By engaging and leading with lived rural experience, we effectively build a rural to urban continuum involving local knowledge and experience, building national connections and partnerships, and providing all with an authentic and personalized commitment for more impactful philanthropy centered on stronger communities. We are an efficiently managed, strong network connecting with partners in philanthropy, business, nonprofits, and government to ensure they can advance their individual and collaborative work that strengthens the quality of life for neighbors, communities, the Mountain State, and the field of philanthropy. We lead with integrity driven partnerships that lift up all partners and cultivate abundance while harvesting opportunities for our neighbors, state, and region.

Strategic Focus

As the leading voice and premiere resource for philanthropy in the Mountain State, Philanthropy WV has a responsibility to ensure we advance thriving communities and the impact of our members, partners, and stakeholders as well as our own future. We treat the mission and business model of our work as one and the same by developing mission-driven programs and priorities that fortify our standing as a philanthropic leader worthy of investment. We will focus on three key strategies:

- **Strengthen our value proposition* and thought leadership** by sharing our knowledge, professional development, and experienced network to inspire transformational change in West Virginia, Appalachia, and serving as a resource and model for other rural and urban communities.
- **Advance our values and commitment to cultivating abundance** for our partners, neighbors, and communities so that West Virginia thrives, providing equitable access to resources, opportunity, and empowerment.
- **Embrace our network's leadership role as a launch point for philanthropy** by serving as a resource, local expertise, and partner to leverage local to national donor/funder investments, build thriving communities, and harvest opportunities that strengthen West Virginia.

We will pursue these strategies while continuing our core work of delivering high-quality professional skill development (board members, CEOs, staff, donors, and advisors), networking and learning among peers, enhancing knowledge and expertise of local to national funders on effective philanthropy, and demonstrating leadership for individuals, foundations, corporations, organizations, and government with grantmaking/philanthropic intent.

Anticipated Outcomes

When we successfully execute our strategy, we will experience numerous outcomes including:

- West Virginia's citizens, nonprofits, and communities will be able to thrive due to a more coordinated and collaborative philanthropy sector among the variety of grantmaking investors based and/or serving West Virginia with increased grantmaking and more locally based philanthropic assets
- Our leadership and reputation will be enhanced through increased visibility, which will be measured by quarterly representation in national media (e.g., magazines, newspapers, podcasts), bi-annual presentations at philanthropic conferences (regional or national), and consulting/program partnerships with our peers, national organizations, foundations, corporations, nonprofits and communities.
- Our network will convene to address systemic issues facing West Virginia, which will be measured by new dollars being funneled to the state for collaborative projects and/or the number of collaborative projects launched through our convening efforts.
- Our value will be recognized and understood, which will be measured by our membership increasing to at least 110 members and hitting participation goals in our programs at least 85% of the time (participation goals will be unique to each program).

- Our state’s philanthropic landscape will be enhanced, which will be measured by our direct involvement in the ongoing improvement in the practice of philanthropy and grantmaking, effective policy advocacy, and the increase of philanthropic assets in West Virginia (e.g., supporting donors in identifying charitable partners, supporting the creation of new foundations, advocating for public policy that provide more equitable access to resources for nonprofits, neighbors, and communities in our state).

Strategy #1: Strengthen Our Value Proposition

Objectives	Action Steps	Staff / Budget	Progress
<p>A. Evaluate our current programming to ensure it is high value / high profitability.</p>	<ol style="list-style-type: none"> 1. Conduct focus groups with our members, stakeholders, and partners to understand the value of our programming from their perspectives. 2. Create a Matrix Map that assesses programming value / profitability, highlighting discrepancies between focus group feedback and numerical data. 3. Compile a list of high value / high profitability programs and activities and examine how we might enhance them to make them even higher value / higher profitability. 4. Compile a list of low value / low profitability programs and activities and examine how we 	<p>Nina</p>	<p>(take out b/c it will all be in zoho)</p>

	<p>might change them to make them high value / high profitability.</p> <p>5. Eliminate programs and activities that cannot be transformed into high value / high profitability programs.</p>		
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Objectives	Action Steps	Staff / Budget	Progress
<p>B. Reposition our branding to emphasize our role as a philanthropic leader in a state with power and potential.</p> <p>(rewrite – communications / marketing - what does it mean for us?)</p>	<ol style="list-style-type: none"> 1. Commission an impact study of our work for our first 30 years. <ol style="list-style-type: none"> 1. editorial calendar / blogs / clarity on newsletter objectives (through this we are able to share consistent voice) 2. Revise our media presence, programs, and activities to focus on investments, impact, and thought leadership 3. Widely publicize impact study results as part of a 30th Anniversary Celebration. 4. Promote and advance public-private-philanthropic-policy partnerships from national to state to local levels that brings resources, opportunities, and 		

	equitable access to all West Virginians. - Give to WV initiative / Ascendium results		
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Objectives	Action Steps	Staff / Budget	Progress
C. Enhance and leverage our influence as the authority on understanding and transforming rural communities.	<ol style="list-style-type: none"> 1. Define “rural” and advocate for broad acceptance of that definition at the local, state, and national level. 2. Submit RFPs to speak at regional and national conferences about transforming rural communities. (this helps us elevate our presence as Phil. WV) 3. Create and widely publish a guide to transforming rural communities. (maybe participate in committees that push this idea forward) 		Year 2 or 3; joining in with others who are already in this space; we can help inform them; talk about our work through our blog; expertise bank; how do we work alongside others in the region

Objectives	Action Steps	Staff / Budget	Progress
D. Connect philanthropic organizations to address systemic issues (e.g., poverty, racism, education, etc.).	1. Create a “priorities catalog” that shows the funding focus areas for each member and house it online as a tool for members to seek funding partners.		year 2 / broadband + equity

	<p>2. Leverage affinity groups to identify systemic issues that cross interests (e.g., health & education, poverty & racism).</p> <p>3. Build on our national network with the Forum, Independent Sector, our peers, etc. to create integrity-driven partnerships that bring knowledge and resources to WV as well as share our rural Appalachian expertise with the world.</p>		
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Objectives	Action Steps	Staff / Budget	Progress
<p>E. Support corporate partners in exploring what they need</p>	<p>1. Develop a work group of corporate members to explore gaps in ESG execution within their organizations. (do they want to do this?)</p> <p>2. Explore corporate interest in investing in WVNPA to address gaps.</p>	<p>Nina</p>	
<p>F. Review and enhance our programming for private and family foundations to support their impact and work</p>	<p>1. Feedback from current members to identify needs and opportunities</p> <p>2. Identify programs/services that Philanthropy WV can develop</p>	<p>Nina</p>	<p>To much focus on community fdns in the past rather than for family and corporate</p>

	<p>3. Identify and engage partners who can help co-create programming, services, and expertise.</p>		
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Strategy #2: Advance our values and commitment to cultivating abundance

Objectives	Action Steps	Staff / Budget	Progress
<p>Not clear about this objective and the steps - is this advocacy work?</p> <p>A. Move our mindset to cultivating abundance within Philanthropy and our state to grow our state to be more inclusive - value our voice/our approach to this work; we have a lot to offer; we are rich – communications objective (how do we pitch who we are to others?)</p>	<ol style="list-style-type: none"> 1. Advance member and partner programming that is built around abundance building focus with the transfer of wealth, talent attraction, and inclusion 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 stronger public policy engagement, priorities, and collaborations that increase resources and opportunities for all citizens 		

<p>B. Lead as a mission-driven organization centering our values by assessing what programs, professional development, partnerships, and policy we devote organizational resources and time.</p>	<ol style="list-style-type: none">1. Implement the integrity-driven partnership model through our work2. Engage in broader education and awareness around equity and inclusion for the board members, CEOs, donors, and others. (Philanthropy WV's focus on equity includes: race, gender, age, ability, sexual orientation, and geography).3. (Year 2) Assess what our values mean in our public policy work to identify new areas of work beyond "protect the sector" issues mobilizing our partnerships to engage more resources for nonprofits and communities.		<p>review this with nina and chad; can we use pieces of this? is this operational / core / guiding principle – shouldn't this be a basis for how we operate</p>
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<p>C. Create and model collaborations that advance our mission, vision, and values among philanthropy, nonprofits, business, government, and citizens</p>	<ol style="list-style-type: none">1. Use research from peers, partners, and new parties to identify “gaps” of need that are not currently met or future needs2. Based upon this data 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)3. Track and evaluate smart growth of this work to identify what is a “fit for our mission” and other partnerships that could better manage the work.4. Gather and share the stories of this work to be thought leaders through the wins and the challenges.		
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Strategy #3: Embrace Our Role as a Launch Point for Philanthropy

Objectives	Action Steps	Staff / Budget	Progress
<p>A. Serve as a resource for individuals and organizations that are interested in philanthropy (including their advisors).</p>	<ol style="list-style-type: none"> 1. Create resource guides that share how individuals and companies can give back to their communities (see Council of Michigan Foundations guides as samples). - who can fund this? 2. 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 larger impact, etc. (Nina for equity consulting) 3. Federal Funders Resources - Hub for State (Funding/Will or Benedum) 4. Opioid Settlement Funding - Hub for State (consulting opportunities to be an expert - how to set up operations) 		

Objectives	Action Steps	Staff / Budget	Progress
<p>B. Reframe the “philanthropic divide” as an opportunity for West Virginians to leverage their power to build a stronger state. - Culture of Philanthropy</p>	<ol style="list-style-type: none"> 1. Launch a “Give to West Virginia” media campaign that highlights charitable giving trends that are positive (tie to 30th Anniversary Celebration). 2. Identify key influencers to serve as spokespersons for the campaign (e.g., high profile coaches/athletes/business leaders who have charitable funds). 		<p>Understand the history and reframe this; keep 5 local; who is the audience for this? is it younger ppl? and reframed – tom haywood</p>

	<p>3. Serve as the “initiation point” for interested individuals and organizations and then connect them to the proper philanthropic partners based on their charitable intent, areas of interest, etc.</p>		(charleston); funding request
<p>Think this is covered in other areas; and we don't have the capacity to do this.</p> <p>C. Expand our national network of philanthropic and government funders through consistent outreach and long-term strategy of engagement (funding/development objectives and model –)</p>	<p>1. Create and launch the WV National Funders Advisory Council to meet at least twice a year to guide, strategize, and promote the dynamic opportunities in West Virginia.</p> <p>2. Coordinate intentional data gathering among partners in the nonprofit, business, community, and government spaces to identify options that are leverage and/or gaps of need to be sure we are engaging all audiences when national opportunities present themselves.</p> <p>3. Work with the current infrastructure of peers and national organizations as well as research expertise to enhance opportunities for collaboration and peer learning for exchange among funder communities and attracting new resources. (Recognizing that we are sometimes a facilitator, connector versus a leader or manager of the partnership)</p>		
<p>D. Work in partnership with national philanthropy serving organizations (PSO) and state PSOs to create partnerships to engage in rural places and/or lift up WV's visibility as a place to invest and explore.</p>	<p>1. Identify and host common programming and knowledge sharing among PSOs</p> <p>2. Model Alaska's Funders Tour into Philanthropy WV programming</p> <p>3. Engagement with PSO peers for program and/or consulting opportunities.</p>		