

Philanthropy West Virginia's Twenty Years & Thriving Strategic Plan
Goal & Objective Tracking & Impact

Goal #1: THRIVING: PHILANTHROPY WEST VIRGINIA (PHILANTHROPY WV) IS A GROWING ORGANIZATION	2012	2013	2014	1Q 2015	2Q 2015	3Q 2015	4Q 2015	1Q 2016	2Q 2016	3Q 2016	4Q 2016
Objectives:											
· Evaluate Philanthropy WV's organizational effectiveness.	DONE										
· Implement organizational improvements identified in the effectiveness evaluation.		DONE	Revisited			Revisited				Revisited	
· Create and implement a revenue generation strategy by December 2012 to diversify and be innovative with the Philanthropy WV's income streams to sustain and grow the organization	DONE	Underway	Underway	<i>Underway ==></i>							
· Retain and recruit new members through an annual membership drive (annually in June adjusting to a December/January format in 2013/2014) that will result in growing membership by at least 10% [Annual]			Transition completed	<i>Underway ==></i>							
· communication/program trainings, and organization communication that is incorporated into a technology strategy (internal/external)											
· Develop a communications plan/PR and Awareness campaign			DONE	<i>Implementation Underway ==></i>							
· Update and maintain major communication and e-presence (website) platforms.		DONE	<i>Ongoing ==></i>								
Goal #2: ACTING: PHILANTHROPY WV OPERATES WITH THE HIGHEST STANDARDS OF ETHICS AND ACCOUNTABILITY	2012	2013	2014	1Q 2015	2Q 2015	3Q 2015	4Q 2015	1Q 2016	2Q 2016	3Q 2016	4Q 2016
Objectives:											
· Update and use job descriptions for board members, officers, committees and committee leaders.	DONE										
· Develop a board orientation packet and process	DONE										
· Identify and meet highest standard of financial and accounting operations for regional grantmakers associations and non-profits including our annual financial audit	DONE	<i>Ongoing ==></i>									
· Maintain a continuous flow of communication and collaboration among the committee and board members to ensure the most effective use of volunteer time and completion of work projects.	<i>Ongoing ==></i>										
· Staff Philanthropy WV appropriately and professionally to respond to program and membership needs.	<i>Ongoing ==></i>										
· Develop an annual work plan with each staff member outlining their individual plan in consultation with the President that advances the strategic plan and budgeting process.	<i>Ongoing ==></i>										
· Complete an annual performance evaluation of all staff in relationship to their annual work plan.		<i>Implemented & ongoing ==></i>									
· Update Philanthropy WV policies to meet the growth and changes as needed		<i>Ongoing==></i>									
Goal #3: CONNECTING/LEARNING: PHILANTHROPY WV IS A LEADER IN PROVIDING MEMBERSHIP SERVICES AND BENEFITS IN WEST VIRGINIA.	2012	2013	2014	1Q 2015	2Q 2015	3Q 2015	4Q 2015	1Q 2016	2Q 2016	3Q 2016	4Q 2016
Objectives:											
· Finalize benefits package including roles and responsibilities of members.	DONE	<i>Ongoing annual updates ==></i>									
· Plan and conduct an annual conference in October.	<i>Ongoing ==></i>										
· Plan and conduct annual trainings for community, private and corporate foundations.		<i>Ongoing ==></i>									
· Continue to develop an annual programming/events calendar.		Initiated	<i>Ongoing ==?</i>								
· Provide training and technical assistance such as evaluation training, best practice sessions, and technical skills to our members.		<i>Ongoing ==></i>									
· Employ the use of creative delivery of knowledge and education statewide through possible webinars and other web-based tools for meetings and presentations to members.		Initiated	<i>Ongoing ==?</i>								
· Continue to deliver once-a-year regional in-person funders meetings that include training, networking, and specific topic presentations.		<i>Ongoing==></i>									
Goal #4: PHILANTHROPY WV'S MEMBERS ARE SERVED BY OUR LEADING AND COLLECTIVE VOICE.	2012	2013	2014	1Q 2015	2Q 2015	3Q 2015	4Q 2015	1Q 2016	2Q 2016	3Q 2016	4Q 2016
Objectives:											
· Collaborate with WV Community Development Hub to successfully launch and grow the WV Non-Profit Association.	Launched	<i>Continued Momentum ==></i>									
· Establish national relationships and partnerships for rural philanthropic development and collaborations that advances West Virginia such as hosting a National Rural Philanthropy Conference in West Virginia [2015], partner with Council on Foundations for Rural Philanthropy programming, and engage national funders on local/regional/state issues			<i>Initiate and expand strategy in 2015 and 2016</i>								
· Establish one collaborative funding project among our members.			<i>Initiate Funding Collaborative Project</i>								
· Cultivate relationships with stakeholders in state (agency, executive, legislative or judicial branches) and federal (Congress, President, ARC, USDA, etc.) government to provide decision-making expertise and be a "go-to" resource for policy makers.		<i>Ongoing ==></i>									

· Serve as the collective voice for our members that educates and advocates on the local, state and federal levels for initiatives, programs, policy, legislation, etc. that advances the philanthropic sector in West Virginia	<i>Ongoing ==></i>										
· Establish 3 new partnerships per year with corporations or industry to increase the involvement/presence of corporate giving programs and foundations in West Virginia.											
· Facilitate research and engagement of the state's grantmakers to support our collective work and ensure that the sector has a voice in issues related to philanthropy and charitable giving.											

Goal #5: PHILANTHROPY WV FACILITATES THE ENGAGEMENT OF PHILANTHROPIC WEALTH IN THE MOUNTAIN STATE.	2012	2013	2014	1Q 2015	2Q 2015	3Q 2015	4Q 2015	1Q 2016	2Q 2016	3Q 2016	4Q 2016
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Objectives:											
· Establish an annual statewide philanthropic "wish list" of needs and opportunities that will result in securing at least \$25,000 in federal government and/or national foundation funds to be used for collaborative projects, re-granting opportunities, and specific programs within WV											
· Conduct a Transfer of Wealth study and use gathered data to educate the public on the transfer of wealth and create momentum for the growth of the state's philanthropic sector over the next decade and beyond.											
· Create and initiate a philanthropist and foundation leader mentorship program to encourage the sharing of hands-on knowledge, skills, and experiences between new and established philanthropy leaders											
· Develop and assist with strategies to identify, gather, and build philanthropic wealth in WV											
· Champion the creation of new (private/family/corporate) foundations or endowments with existing community foundations among West Virginia's citizens and former residents starting with one per year											
· Serve as a resource and advisory group to assist/engage individuals, corporations, communities, and organizations considering to create and grow foundations with two major contacts in the first year and expanded each year afterwards											
· Establish a mission-based procedure to evaluate and select/decline special initiatives, projects, and programs for Philanthropy WV that arise from opportunities.											
· Complete, publish, and promote an updated State of Philanthropy in WV Report the first to be issued in Fall 2013 to be repeated every two to three years that is disseminated throughout the state's media, government, non-profit, business, industry, education/higher education, and professional networks.											

Additions from Board & Staff June 2014 Compression Planning:	2012	2013	2014	1Q 2015	2Q 2015	3Q 2015	4Q 2015	1Q 2016	2Q 2016	3Q 2016	4Q 2016
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Develop elevator speech and talking points for Staff and Board Member "sales pitch" to join Philanthropy WV along with infographic about Philanthropy's impact, and menu/overview of Philanthropy WV's offerings and services											
Offer Consulting and support on our fees structure basis for Corporate Giving Programs and Corporate Foundations											
State-Wide Marketing Plan including Rotary Club/large organizational local/regional/state association/club meetings, partnerships with WV Public Broadcasting and state-wide magazines such as WV Living, WV Executive, State Journal, etc. for overall organization promotion for membership, impact, and advancing philanthropy in WV											
Recruitment: Engage non-member foundations and corporations to attend programming especially Annual Conference with specialized communications											
Grow relationships and partnerships with professional advisor community on the regional and state level											
Sponsorship & Consulting Services Growth: Send Targeted messages to potential sponsors and consulting service clients											
Select a focus project (as we can't do everything) to poll members, convene, access grants, staff, research, and focus on one area for leveraging of resources to bring in National or Regional Foundation/Government Grant funds to advance an issue.											
Offer consulting assistance on long range planning for nonprofits											
Other Items Raised, but not assigned:											

Capitalize on Spirit of Philanthropy Awards to recognize winners and promote Philanthropy in WV
 Nominate members for major awards: Who's Who in WV, Generation Next: 40 under 40, etc.
 Serve as funders match for federal government funder opportunities
 Pooling of funding for training among specific interest areas and programs
 Recruit, train, organize volunteers among regional foundation partnerships such as collaborative work on better impact for back pack programs provided locally. Have that coordinated effort.
 Focus on efforts among legal, business, social services, nonprofits, and government being involved in the drug courts