



As philanthropy is constantly evolving so does the nature of our nation's Philanthropy Support Organizations, the following is a summary of some "Promising Practices" taking place in the country with other Regional Associations of Grantmakers (RAs):

- **Learning Series:** Coordinated program delivery that involves a learning to action process taking a topic from initial learning from a webinar or conversation to a series of in-person seminars and/or webinars that coaches, supports, and mobilizes a foundation and/or partners to take action
- **Affinity Groups:** Convening foundations, giving programs, philanthropists, and sometimes the general public or partner organizations around a common interest, grantmaking, or program area for peer learning, program development, co-funding investments, and/or policy proposals to change the issue or identified need.
- **Mission Drive Revenue Generation:** Due to the changing environment of revenue generation for Regional Associations (RAs) several of our peers are creating specialized programs to serve a much identified need in the sector as well as generates a new revenue stream for organizational sustainability. For example, Washington Regional Association of Grantmakers has created the Corporate Responsibility Institute in partnership with John Hopkins University for the training (new orientation for beginners and innovative practices for seasoned professionals) of staff from businesses of all sizes on effective Corporate Giving/Responsibility practices and approaches for their work. It is bringing a substantial revenue stream to the organization and a value-added for its corporate members.
- **Brokering Public-Private-Philanthropic-Nonprofit Partnerships:** RAs are taking the different sectors through the partnership forming and long-term process and sharing lessons learned to engage others for effective project completion, community impact, and advancing a common issue/mission
- **Public Awareness and Education:** Our peer organizations are using their roles to educate their members and also the government grantmaking side to improve practices, ethics, and collaborative relations across our communities. One Regional Association has lead a series titled "Putting Racism on the Table" about the role Philanthropy plays in improving recent public challenges when it comes to race and/or discrimination. In Illinois, our peer organization started the national effort to dispel the long-standing overhead myth about the cost of overhead for nonprofits that is incorrect. The work has focused on educating the foundation community, government, nonprofits, and the general public about this long-standing myth and how non-profits need to be properly funded to be sustainable delivering quality programs and highly skilled staff members.
- **Serving as a Base for Collaborative & Catalyst Work:** At the core work of regional associations of grantmakers, serving as a base for collaborative efforts and as catalysts for change this continues to be done in many forms. As an example, this is done by convening different segments of a community/state/society to learn or address a common issue: economic revitalization, impact investing, opioid abuse, Workforce Development, etc. that then leads to an action strategy that can be helpful for specific members/sectors. The regional associations are looked at partners to help model out initial Catalyst Work in new grantmaking approaches, private/anonymous major re-granting projects, or convening peer foundations around a common issue to work on it from a collaborative funding model.
- **Service Delivery Partnerships:** Philanthropy WV is talking with its peer Regional Associations of similar size, membership, and focus to start expanding membership value with more webinars, communication, and possibly shared speakers. The Forum Network allows for us to learn, partner, and leverage opportunities with peer organization to connect our members with the best options on service, training, learning, and peer networking such as the recently launched "Legal Help Desk" for community foundations. Several other partnerships will be announced later this year.

PHILANTHROPY WV'S CURRENT PROGRAMS & INITIATIVES SUMMARY:

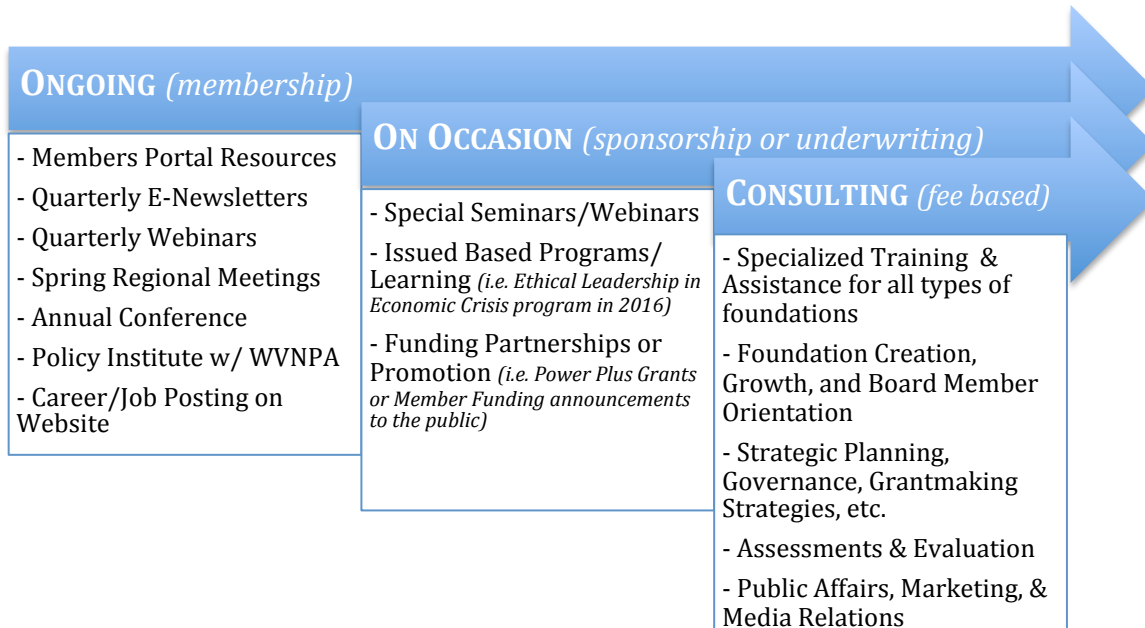
OUR COMMITMENT: *Networking with Impact, Training for Transformation, Collaborating for Change, and Advancing Philanthropic & Civic Leadership*

Professional Education & Specialized Training of WV's Philanthropic Sector:

For over 20 years, Philanthropy WV serves as the statewide leadership organization to provide professional education and specialized trainings for the state's private, family, corporate, community, and public foundations, giving programs, and individual philanthropists. The training and programs that we deliver are not just for awareness, but result in action that benefits communities, citizens, and the entire state. In the past four years and into the future as outlined in our "Twenty Years and Thriving" Strategic Plan, Philanthropy WV is focusing its programs and education on providing opportunities for philanthropy to support economic and community development, education transformation, wealth engagement, health and human services, arts

and culture, youth, family, and seniors along with many other issues. This work is facilitated through sponsorships, special underwriting, and registration fees and delivered. The following outlines the levels of service/programs currently provided by Philanthropy WV through general membership access, sponsorship and/or underwriting, and consulting based services and the second breakout is programs/services via sector of foundations:

FOR ALL MEMBERS:



PROGRAMS BY SECTOR: (* = potential partnership with peer regional associations)

SECTOR	PRESENTLY	UNDERWAY/FUTURE
COMMUNITY FOUNDATIONS	<ul style="list-style-type: none"> • Community Fdtns Institute • Quarterly E-Newsletter • Keep5Local Program Services • Direct Assistance • Sessions at the Annual Conference • CF Boot Camp (as needed/requested) • Consulting Services (fee based) 	<ul style="list-style-type: none"> • Legal Help Desk* • National List serve* • CFI CEO & Development Retreat • Multi-State CF Conference in 2017?* • Possible QTRLY Webinars*
PRIVATE & FAMILY FOUNDATIONS	<ul style="list-style-type: none"> • 2015 WV Ldrshp Academy • Annual Conference Sessions • Direct Assistance & Resource Sharing • Consulting Services (fee based) • Peer Networking 	<ul style="list-style-type: none"> • Quarterly Webinars* • Trustees/Directors & CEOs In-Person Program (2017) • Quarterly E-Newsletter* • Expansion of Legal Help Desk * • Assistance for New & Long-Term Boards • Get on the Map • Creation of a Private Fdtn Boot Camp and/or Mentorship Program
CORPORATE GIVING PROGRAMS & FOUNDATIONS	<ul style="list-style-type: none"> • 2015 WV Ldrshp Academy • Annual Conference Sessions • Direct Assistance & Resource Sharing • Consulting Services (fee based) • Corporate Responsibility Luncheons • Peer Networking 	<ul style="list-style-type: none"> • Monthly E-Newsletter* • Quarterly Webinars* • Corporate Responsibility Summit • Get on the Map • Specialized Consulting/Training • Creation of a Corporate Responsibility Boot

	<ul style="list-style-type: none"> • Grantee Identification 	Camp and/or Mentorship Program
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SUMMARY OF OUR PROGRAMS:

Sparkling Solutions Consulting & Planning Services: Philanthropy WV serves the state’s philanthropic sector including private, family, community, public and corporate foundations, corporate giving programs/marketing divisions, and individual philanthropists through a variety of consulting, strategic planning, customized training, and deep knowledge of the field to help you navigate the changing landscape of today’s philanthropy. We develop authentic relationships with our clients that allow them to experience joyful, meaningful and effective impact. We serve to create and sustain strong, equitable and healthy communities in West Virginia. Our consulting services advance your work and impact of foundations, giving programs, and individual philanthropists serving and/or based in the Mountain State. Philanthropy WV’s delivery of consulting, training, and strategic planning services is engrained in our mission of “Strengthening Philanthropy in the Mountain State”. Our staff brings more than two decades worth of expertise and successful impact in the philanthropic and nonprofit sectors. Our consulting and planning services includes:

- *Strategic planning that leads to organizational progress and growth*
- *Foundation creation, mission development, board governance, grant focus and application processes, and general organization setup or restructuring*
- *Independent/Objective Foundation Evaluations & Grantee Surveys for Impact & Outcomes*
- *Board & Staff retreat design and facilitation*
- *Foundation Development Feasibility & Assessment Studies*
- *Community Planning, Town Hall Forums, Public & Media Affairs, Education, & Trainings*
- *Staff & Board Member Role Workshop & Trainings*
- *Growth Management and Planning*
- *Philanthropic Development & Asset Growth Training (specifically for community foundation donor development and asset growth)*
- *Creation & Implementation of Foundation & Grantee Collaborations*
- *Road Map and Program Development*
- *Other Programs created in response to specific needs of clients*

Our partnership with you and your philanthropic institutions for consulting, training, and strategic planning services begins with a conversation and we invite you to contact Paul at paul@philanthropywv.org or call 304.517.1450.

Corporate Responsibility Program: Philanthropy WV is expanding corporate members and partnerships in 2016 through our Corporate Responsibility Council. This program convenes corporate giving programs and foundations with a presence and/or based in West Virginia with their peers to determine key initiatives to support, best practices, and how to leverage their corporate giving to benefit communities. We have established practices with corporates for program services/trainings, networking with peers and other foundations for collaborations, identification of prospective grantees in specific geographic areas, and adopted protocols to allow for Funding Collaboratives on key issues/needs across the state. We will assess the new Corporate Social Responsibility Institute developed by the Washington Regional Association of Grantmakers in partnership with John Hopkins University to duplicate training and resources that lead to action for corporate leaders especially for those starting new corporate giving programs or coming into the state for the first time. This programming and services will result in more educated and engaged corporate philanthropy programs in the state investing in diverse needs and causes from community development to human services to arts/culture

Keep5Local (*West Virginia’s Transfer of Wealth Engagement*): Philanthropy West Virginia in partnership with our community foundations is facilitating the Transfer of Wealth assessments, developed a comprehensive strategy for Transfer of Wealth Engagement, capturing natural resource wealth and moving community foundations from grant makers to civic leaders in the Mountain State. Thanks to the support of the Claude Worthington Benedum Foundation this work has moved to a new level by gaining resources, trainings, models, and tools from other regions/states who have done similar work. This information is being used in West Virginia for the engagement of wealth to attract/retain young talent, keep local assets, and provide civic leadership. Philanthropy WV has more than 15 years of success working with community foundations in growing the state’s base of community foundation assets. The assets have tripled during the past decade. This strategic initiative is a growing collaborative effort among Philanthropy WV, community foundations, general public, wealth managers, business, industry, government, and other key players to engage the wealth. Philanthropy WV has a growing base of philanthropic support for this project including Benedum Foundation (2015 with new grant proposed for 2016-2017), USDA RCDI Grant, and other underwriting and sponsors. *For more information, visit: www.keep5local.org*

Bringing National Investors and Partnerships for West Virginia’s Communities:

Philanthropy WV is part of the country’s largest network of philanthropy representing over 4,000 grantmaking institutions. As identified in our current strategic plan, Philanthropy WV is working to engage new national and regional players in the grantmaking landscape of the state providing strategic investments that advance beneficial programs and projects that serve organizations, communities, and our neighbors in the Mountain State. This present work is focused around the Kresge

Foundation Delegation visit in late June 2016 that is been a year and a half of relationship building. Additionally, Philanthropy WV has researched and discussed with colleagues from Alaska who facilitated the creation of the Rasmussen Foundation's "Ed Tour" program to bring in national foundation and federal funders to increase grants and support within the state. We would coordinate a special National Funders "Invest in West Virginia" Immersion Tour at a soon to be defined date. We strategically identify national players to bring to the table to educate on innovative and impact oriented programs and organizations to support in the state, serve as speakers at our Annual Conference, and then move them to opening up partnership with local funders that leverage new resources into the state. The invited foundation representatives would be provided a program of education, networking, and first-hand experiences similar to the success of the Rasmussen Foundation's approach in Alaska that delivered new dollars of grantmaking in to rural communities. Philanthropy WV will be working with major funders to secure funding to facilitate this process.

Get on the Map:

This is a partnership between Regional Associations of Grantmakers and The Foundation Center to assist members of Philanthropy WV or other regional associations to have access to a reporting system to see who among your peer foundations/giving programs are giving in what places, on what issues, and for what organizations. Philanthropy WV is focusing on the summer and fall months to work with its interested members to upload the data to setup the portal. This serves as a digital tool for members to research credibility of nonprofits to support, possible funding partnership opportunities, and look at the reach of peers and areas of interest. The program is being implemented through 2016.

WV Nonprofit Association:

Initiated in 2012, the WV Nonprofit Association (WVNPA) is a program of Philanthropy West Virginia. The WVNPA serves as the state's professional network for the nonprofit community with nearly 260 members. Philanthropy WV created the WVNPA along with other partners (WVCDH, etc.) thanks to an ongoing investment by the Benedum Foundation to have a statewide support system that advance the nonprofit sector with best practices, training, collaborations, and advocacy. Philanthropy WV serves as the fiscal sponsor while coordinating the accounting, human resources/payroll, and some program services/collaborations. *For more information, visit: www.wvnpa.org*

Other programs are ongoing as for more information and details please contact our office at 304.517.1450 or email Paul at: paul@philanthropywv.org