

# PRESIDENT'S REPORT

## QUARTERLY REPORT

This report highlights Philanthropy WV's key activities for February through May 2018 around the goals in Philanthropy WV's Strategic Plan:

- A. Membership Services & Growth: Retain & Expand Philanthropy WV's broad network of members
- B. Philanthropy Giving & Impact: Expand philanthropic investments and giving to influence positive change across West Virginia
- C. Leading & Advocacy: Philanthropy WV's collective serves the sector, our partners, and thriving WV citizens and communities.
- D. Sounds Operations & Financial Stability: Effectively carry out our mission through organizational and financially resilient practices.

### HIGHLIGHTS:

- 94.4% Membership renewal as of 05/10/2018 and 2 new membership applications for board approval
- New D&O, General Liability, Professional Liability, etc. Insurances as of 04/2018 is Guide One
- Philanthropy WV is preparing major grant applications to submit to four funders (*Steeley Foundation, McDonough Foundation, BB&T CRA, and Dominion Foundation*)

### Goal 1: Membership Services & Growth:

- Hilaria is hosting (as noted in the program report) at least 6 webinars in 2018 for all members plus specialty sessions. This includes "Webinar Watch Parties" to encourage regional networking
- We have expanded programs by offering topical trainings and programs for 2018: community economic development, philanthropy's response to the opioid crisis, reverse scholarships, education, etc. There are additional partnerships underway.
- By the time of our mailing, a direct mail campaign will have been sent out to private and family foundations, professional advisors, and corporate philanthropy leaders to then have assigned phone call follow ups.
- Special rates are being offered associated with the 25% anniversary.
- I've made 6 new member solicitation visits since February and two new membership applications.
- Thanks to Krissi Raymond, Operations & Communication Assistant, she has been improving our e-communications by identifying best practices and working with staff to implement them. Here's an overview of her work. **MailChimp (uses for e-newsletter, program announcements, and partner outreach):**

	Open Rates	Click Rates
Before New System	24.56%	1.15%
With New System	37.66%	5.66%
Difference	13.1%	4.51%
Q1 Average	32.67%	3.94%

- Facebook: Reached 504 (decreased from previous month) – April 16 – May 16; 29 page views (increased); Page likes/followers = 5 (decrease); Post engagements = 77 (increased); and 54 video views.
- Twitter: 40 Outgoing tweets, 11,954 impressions (number of times people saw the tweets), 156 engagements = 0.01% of people reached have engaged; profile visits = 493; mentions = 6; and new followers = 15 adding for a total of 892
- Google Analytics for [www.philanthropywv.org](http://www.philanthropywv.org): 938 site users; 1530 site visits; 1.63 sessions per user; 4,451 page views; 2.91 pages per session; 02:54 minutes avg session duration; and 80% of visits to site were new; 20% were returning users.

### Goal 2: Philanthropic Giving & Impact:

- Upon request, we have been promoting some of our newer members grantmaking program cycles per their requested assistance.

- Our USDA RCDI program working on Barbour, Doddridge, Nicholas, Ritchie, and Summers is boosting both community foundation leadership and impact along with nonprofit strengthening (a full report from our program coordinator is attached)
- Philanthropy WV hosted Give2WV Day on May 1<sup>st</sup> supporting the work of the Hardy County Community Foundation and Hinton Area Foundation raising \$5,585 and \$4,052 in the same order.
- We are using data compiled by our program fellow late last year on opioid crisis grantmaking to fuel support through our working group. This report has been shared with several members.
- Our working groups will use data provided to begin leveraging investments, and strengthen the impact of collective grantmaking.
- With staff capacity improving, we will be focusing on the Get on the Map resources for those interested over the summer months. This creates a better understanding among funders on what areas, programs, and issue areas are other foundations/corporate giving funding to collaborate better
- Our second year of the Foundation Openness series, thanks to the grant through the Forum, will kick off in June to advance cross sector collaborations with initial sessions in Charleston and Parkersburg and second sessions in Wheeling and Lewisburg.

### **Goal 3: Leading & Advocacy:**

- Philanthropy WV since our trip to Foundations on the Hill in March, thanks to Tres Ross, Dr. Michelle Foster, and for part of the trip Renee Margocee has included next steps around Universal Charitable Deduction Act, Reverse Scholarships logistics with US Treasury, and new support of charitable legislation by both Congressman McKinley and Congressman Mooney.
- Plans are underway to convene the inaugural meeting of the WV Impact Commission in late June pending final confirmation of key leaders
- Outreach is underway to host the new Appalachian Regional Commission Federal Co-Chair
- Delivered four presentations in the past three months: WV Lions, WV Estate Planning Seminar, etc.

### **Goal 4: Sound Operations & Financial Stability:**

- Annual Audit is underway with draft to be received by the board meeting and then presented at the August Board of Directors meeting. Our auditors requested and got approval for an extension on our Form 990 submission from the IRS.
- Our Susan Stevenson Landis Spirit of Philanthropy Endowment has reached the minimal endowment of \$10,000 a month early which is now near \$12,000 as of 05/2018.
- Identified needs for new software, IT support, Membership Tracking Software, and project/program tracking systems. These will need investments of which proposals are being drafted.
- Solicitations for Philanthropic Partners, Corporate Sponsors, Grants, and Consulting are underway

### **Opportunities & Challenges:**

- Funding invitation by the Steeley Foundation to strengthen our Education Funders Affinity Group work.
- Past sponsors have already built us into their 2018 budgets of which I'm soliciting now for support
- Orientation and staff capacity is a challenge for it requires a full 4 to 8 months for new staff to get comfortable in their work
- Enhancing revenue generation while running programs is a unique dance
- Developing programs for both senior leaders and developing a pipeline to recruit new talent for our members (board, staff, and CEOs). A rising leaders program has been a growing topic of interest to members.
- Investigating options with funding and time to enlist assistance of a CEO coach

### **What's being said - Feedback from members and the field:**

- *“Philanthropy WV presents the big picture to me, to see beyond my own small town. It opens the window to what others are doing throughout West Virginia and how they are going about doing both small and great things. As a result, I think and dream bigger and am inspired to do more than seemed possible before.” ~ Jan Wilkins, Tom & Virginia Seely Foundation*
- *“Philanthropy WV is a great collaborative partner with our national philanthropy network. I've seen firsthand the value that the organization brings to the state. There's no other place where funders can connect with their peers, learn new and innovative practices and concepts, and have a collective voice for the field.” ~ Dave Biemesderfer, United Philanthropy Forum*
- *“As Philanthropy WV pauses to reflect on your past 25 years of success, please take a bow for envisioning, forming, nurturing, and recently launching the West Virginia Nonprofit Association as an independent organization. Your leadership and commitment in that achievement will produce tremendous dividends, improving lives and communities across West Virginia over the next 25 years ... and far beyond.” --Tim Delaney, President & CEO, National Council of Nonprofits*

**FROM: Tasha Anderson, Ph.D. – Program Coordinator**  
**USDA RCDI Grant Update**  
**May 17, 2018**

The following highlighted updates show USDA RCDI grant utilization in the five strikeforce counties of Doddridge, Ritchie, Barbour, Nicholas, and Summers counties.

- The first quarter of 2018 found Doddridge, Ritchie, Nicholas, and Summers counties moving forward on utilizing grant funding.
- Barbour County has since made strides to find leadership and momentum as well, although are slow to develop a plan of participation.
- All five counties participated with representation in a webinar outlining resources and requirements for funding utilization in January 2018.
  - This resulted in the four counties providing annual strategy plans for utilizing funds for the second year in wealth engagement and program development.
  - An electronic contact list for the nonprofits in all five counties was created to better disseminate opportunities made possible by the grant.
- Summers and Nicholas counties brought in specialized training for their community foundations to enhance wealth engagement in their communities with the Boot Camp program facilitated by Judy Sjostedt of Parkersburg Area Community Foundation.
- Doddridge and Ritchie held nonprofit assessment meetings to more fully understand the needs of the nonprofits. This resulted in a targeted strategy to bring resources to the counties to address nonprofit needs throughout the year, with the first training as early as the second quarter of 2018.
- Barbour County has come to the table to discuss options for delivering services and more fully embracing funding utilization in their county. The goal is to begin planning nonprofit interactions in Barbour County with the Tucker Community Foundation and provide Foundations 101 training to the Barbour County Community Foundation board with the long-term goal of having Bootcamp training soon after.
- Summers, Doddridge, and Ritchie counties participated in the state-wide giving day in the second quarter of 2018 to promote wealth engagement.
- Nicholas County has set a tentative date for their nonprofit assessment workshop.
- Doddridge, Ritchie, Nicholas, and Summers counties have secured at least one representative from each county to attend the Community Foundation Institute in June. The goal is to have 2 representatives from each RCDI county.

Respectfully submitted by:  
Tasha Anderson, PhD  
RCDI Program Coordinator