



COMMUNITY FOUNDATION FOR THE ALLEGHENIES

SERVING BEDFORD, CAMBRIA, SOMERSET, AND INDIANA COUNTIES



Strategic Plan 2018-22

Overview

Mission, Vision, and Values

Mission: We empower all people to become philanthropists who have a permanent impact and leave a lasting legacy in our region.

Vision: We envision an inclusive and engaged culture of philanthropy that grows an abundance of resources, achieving perpetual impact in a thriving region.

Values:

- **Philanthropy:** recognizing that every person has the potential to leave a legacy
- **Empowerment:** partnering with our donors to realize their philanthropic dreams
- **Integrity:** exemplifying honesty and transparency in all that we do
- **Leadership:** understanding, identifying, and responding to community opportunities
- **Collaboration:** leveraging and connecting community resources to maximize impact for all

Strategic Initiatives

- 1. Growth:** Ambitiously grow our portfolio to \$85 million to increase our donors' philanthropic legacies
- 2. Impact:** Strategically leverage resources to best address community needs and invest in opportunities
- 3. Promotion:** Grow, educate, and engage our donor base through consistent and informative communication
- 4. Capacity:** Adjust our internal operations to achieve our strategic goals

Goals

Strategic Initiatives and Goals

--Growth--	--Impact--	--Promotion--	--Capacity--
Ambitiously grow our portfolio to \$85 million to increase our donors' philanthropic legacies	Strategically leverage resources to best address community needs and invest in opportunities	Grow, educate, and engage our donor base through consistent and informative communication	Adjust internal operations to achieve our strategic goals
1.1. Grow the total number and value of donor advised and other funds	2.1. Develop expertise in identifying and synthesizing community needs and opportunities	3.1. Develop a brand to gain greater awareness and recognition of impact	4.1. Develop and sustain an organizational structure that embraces and aligns with strategic goals
1.2. Emphasize and cultivate planned giving as a means for donor legacy	2.2. Leverage unrestricted and field of interest funds to impact key areas of regional need	3.2. Develop and execute targeted and comprehensive marketing campaigns to engage multi-generational audiences	4.2. Provide staff with the tools and technology necessary to achieve strategic goals
1.3. Grow the total number and value of major gifts	2.3. Communicate and package community need to donor advisors	3.3. Become a recognized pillar of our community through earned media opportunities	4.3. Ensure our processes and practices promote optimal operations
1.4. Secure unrestricted funds to achieve immediate strategic goals	2.4. Equip our partner agencies to be more effective and efficient		4.4. Position us for long-term financial health
1.5. Develop value-added tools and services for professional wealth advisors			4.5. Align our governance practices with strategic goals

Action Plan (Excerpt)

For complete action steps, please see complete plan

1. Growth – Ambitiously grow our portfolio to \$85 million to increase our donors’ philanthropic legacies

1.1 Grow the total number and value of donor advised and other funds

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
1.1.1 Achieve asset growth annually to total: 1.FY 2018: \$70 million 2.FY 2019: \$75 million 3.FY 2020: \$80 million 4.FY 2021: \$85 million 5.FY 2022: \$90 million	Kane	<u>Jan 2017</u>	June 2022	Asset growth targets met and revised annually	All the resources	Ongoing
1.1.2 Develop an existing donor survey to measure customer service quality and identify opportunities for improvement	Perkosky	<u>Sept 2017</u>	Feb 2018	Response rate	Survey Monkey, staff time	
1.1.3 Conduct meetings with select donor advisors at least once every two years	Hencel	<u>Mar 2017</u>	Dec 2022	Meet with all targeted donors once every two years	Significant time commitment from staff	Ongoing - Moves Mgmt.
1.1.4 Develop a second-generation strategy to reach children of existing donors	Hencel	<u>July 2017</u>	Dec 2018	Reporting relevance of activity	Part of annual donor meetings	Ongoing - Moves Mgmt.
1.1.5 Review and triage donors and funds for growth potential based on meetings	Hencel	<u>March 2017</u>	Dec 2022	Number of meetings; reporting relevance of activity;	Staff time	Ongoing - Moves Mgmt.
1.1.6 Leverage existing donor advisors for introductions to high-potential major givers and donor advisors	Hencel	<u>March 2017</u>	Dec 2019	Increase in rate of meetings with donors and advisors	Part of survey and annual meeting process	Ongoing - Moves Mgmt.



Thank you for being part of the
Community Foundation's planning!