

**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 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  1.2: Emphasize and cultivate planned giving as a means for donor legacy  1.3: Grow the total number and value of major gifts  1.4: Secure unrestricted funds to achieve immediate strategic goals  1.5: Develop value-added tools and services for professional wealth advisors	2.1: Develop expertise in identifying and synthesizing community needs and opportunities  2.2: Leverage unrestricted and field of interest funds to impact key areas of regional need  2.3: Communicate and package community need to donor advisors  2.4: Equip our partner agencies to be more effective and efficient	3.1: Develop a brand to gain greater awareness and recognition of impact  3.2: Develop and execute targeted and comprehensive marketing campaigns to engage multi-generational audiences  3.3: Become a recognized pillar of our community through earned media opportunities	4.1: Develop and sustain an organizational structure that embraces and aligns with strategic goals  4.2: Provide staff with the tools and technology necessary to achieve strategic goals  4.3: Ensure our processes and practices promote optimal operations  4.4: Position us for long-term financial health  4.5: Align our governance practices with strategic goals

# 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 2017 \$65 million 2.FY 2018: \$70 million 3.FY 2019: \$75 million 4.FY 2020: \$80 million 5.FY 2021: \$85 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.

## 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
1.1.7 Develop and execute an event for high-potential donors to grow top funds (e.g. review of fund performance with investment manager)	Kane	<u>Jun 2017</u>	Jun 2017	Participation survey results	Strategic use of event planning time and financial resources	Completed for 2017; 2018 not yet planned
1.1.8 Develop and execute an annual event connecting highest potential donors with grantees to communicate impact and include media	Berzonski	Spring 2018	Spring 2022	Number of attendees	Strategic use of event planning time and financial resources	
1.1.9 Develop a strategy to engage the Board of Directors in the solicitation and stewardship of major gifts	Kane/Hencel	<u>Dec 2017</u> Board Mtg	Dec 2017	Number of arranged meetings	Staff and Board time	
1.1.10 Develop a strategy to engage the Board of Directors to steward current DAFs to sustain and grow assets	Kane/Hencel	<u>Dec2017</u>	Dec 2017	Number of arranged meetings	Staff and Board time	
1.1.11 Convene a committee to simplify messaging of the DAF concept to make it more accessible	Berzonski/Perkosky	July 2018	Dec 2017	Amount of DAF activity and inquiries	Brochures	
1.1.12 Build and communicate value proposition vs. commercial fund options	Kane/ Board Member	July 2018	Sept 2018	Production of informational material	Wealth Advisors as a reference	
1.1.13 Conduct regular (quarterly) sales training and professional development sessions for staff	Kane	<u>March 2017</u>	Spring 2022	Number and quality of meetings	Internal training, external training and financial resources	Built into MOVES meetings
1.1.14 Identify and prospect private foundation conversion opportunities	Perkosky	<u>Dec 2017</u>	April 2018	Research results	Research and staff time	

## 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
1.1.15 Review new fund creation process and simplify if necessary	Hencel/ Perkosky	<u>March 2017</u>	March 2017	Assess annually	Staff time	Completed
1.1.16 Expand CFA profile and impact in Indiana County <ol style="list-style-type: none"> <li>1. Assess competition, including the Pittsburgh Foundation</li> <li>2. Conduct exploratory interviews with county leaders and friends of CFA to assess opportunity</li> <li>3. Articulate community needs related to CFA activities</li> <li>4. Develop a strategic plan for services in Indiana County</li> <li>5. Develop a staffing model, including advisory board, to serve Indiana County</li> </ol>	Kane/Hencel/ Board	<u>Apr 2017</u>	Spring 2022	Activity targets, asset targets to be defined by Indiana County Committee (see 4.5.8)	Reallocation of staff and board time	In progress

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**1.2 Emphasize and cultivate planned giving as a means for donor legacy**

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
1.2.1 Create and disseminate simplified and turn-key planned giving information to current donors and other targeted populations	Kane	<u>Jul 2017</u>	Jun 2018	Finalizing the toolkit	Marketing firm; financial resources	Not started
1.2.2 Develop collateral and talking points to enable annual planned giving discussions with donor advisors	Hencel	<u>Aug 2017</u>	Dec 2022	Quality of materials	Financial resources	
1.2.3 Review and update internal policies and procedures regarding planned gifts	Hencel	Jan 2018	Jun 2018	Efficiency of staff	Staff time	
1.2.4 Research and set appropriate activity targets for conversations about planned giving: <ol style="list-style-type: none"> <li>1. FY 2018: 60 conversations</li> <li>2. FY 2019: X60 conversations</li> <li>3. FY 2020: X60 conversations</li> <li>4. FY 2021: X60 conversations</li> <li>5. FY 2022: X60 conversations</li> </ol>	Hencel	<u>July 2017</u>	Dec 2022	Increase # of planned giving conversations as part of annual stewardship activities with DA, designated and Scholarship fund reps working from baseline of 300 funds	Accomplished through annual donor meetings, use list of existing major donors	Development of new material by Dec 2017

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**1.3 Grow the total number and value of major gifts**

**Major gift threshold = \$10,000**

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
1.3.1 Identify top priority current donors to target major gift solicitations (\$10,000+)	Hencel	<u>June 2017</u>	Dec 2018	Growth of the MOVES list	Staff time	Underway
1.3.2 Develop collateral and talking points to enable annual major giving discussions with key donor advisors	Berzonski/ Hencel	<u>Jul 2017</u>	Dec 2022	Development of materials	Staff time and printing cost	Talking points developed and to be prioritized Aug 2017
1.3.3 Develop a strategy to leverage Board of Directors to identify major gift prospects	Kane	<u>June 2017</u>	Dec 2018	Number of prospects	MOVES; board	
1.3.4 Develop and maintain a “wish list” of high profile/net worth regional natives and a strategy to pursue opportunities	Perkosky	Oct 2018	Dec 2018	Growth of Ex-Pats group	Staff time, financial resources	
1.3.5 Continue to develop relationships with outside foundations to target pass-through revenue and major gifts	Kane	<u>Jan 2017</u>	Dec 2022	Dollars through the door	Staff time	Underway
1.3.6 Research and set appropriate activity targets for conversations about major gifts (new and recurring): Tentatively: 1. FY 2018: 50 2. FY 2019: 55 3. FY 2020: 61 4. FY 2021: 77 5. FY 2022: 85	Hencel	<u>Jul 2017</u>	Dec 2022	Final projection depends upon number of donor advisors appropriate for major giving	Staff time	Underway

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

**1.4 Grow unrestricted funds to achieve immediate strategic goals**

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
1.4.1 Unrestricted gifts (Fund for Future and others): 1. FY 2018: 54 2. FY 2019: 59 3. FY 2020: 66 4. FY 2021: 73 5. FY 2022: 80	Kane	<u>Jul 2017</u>	Dec 2022	Mostly smaller gifts; few major gifts, and bequests	Staff time, collateral material	
1.4.2 Develop value proposition for unrestricted giving to include in solicitation collateral and annual donor meetings	Hencel/ Berzonski	Jan 2018	June 2018	Completion of these materials	Staff time and printing cost	
1.4.3 Develop and implement campaigns for significant “field of interest” funds to be designated by the board	Kane	Jan 2020	Dec 2020		Reallocated staff time	
1.4.4 Conduct cost-benefit analysis of requiring a percentage of all donations go to unrestricted fund, or similar strategy	Kane	Jan 2018	Jun 2018	Report recommendation	Staff time, research	

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**1.5 Develop value-added tools and services for professional wealth advisors**

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
1.5.1 Identify and maintain database of wealth advisor relationships: 1.FY 2018: 4 new PLAN members 2.FY 2019: 4 new PLAN members 3.FY 2020: 4 new PLAN members 4.FY 2021: 4 new PLAN members 5.FY 2022: 5 new PLAN members	Hencel	<u>Jan 2017</u>	Spring 2022	Increase PLAN membership from 19 in 2017 to 40 in 2022	Staff time	Ongoing as part of PLAN and Moves Mgmt.
1.5.2 Create and disseminate simplified and turn-key planned giving information to wealth advisors via website and mailers	Berzonski/ Hencel	<u>Oct 2017</u>	Feb 2018	Number of inquiries and meetings with wealth advisors	Web development, consult with wealth advisors and financial resources	
1.5.3 Develop collateral and talking points to enable annual planned giving discussions with donor advisors	Berzonski/ Hencel	<u>Oct 2017</u>	Feb 2018	Completion of the materials	Staff time and printing costs	
1.5.4 Conduct quarterly continuing education seminars for wealth managers on topics of interest	Hencel	<u>Jan 2017</u>	Spring 2022	Development and scheduling of PLAN events	Staff time and event development	On track to execute 3 2017 – March June Fall TBD



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## 2. Impact – Strategically leverage resources to best address community needs and invest in opportunities

### 2.1 Develop expertise in identifying and synthesizing community needs and opportunities

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
2.1.1 Develop partnerships with United Way, colleges, county human services agencies that have the pulse of community needs	Berzonski	<u>Jan 2017</u>	Dec 2022	Development of a gap analysis	Free up adequate staff time in each county	Ongoing
2.1.2 Aggregate community needs assessments developed by other agencies into county-level needs assessments	Berzonski	Jan 2018	Dec 2018	Development of a gap analysis	Intern from IUP Graduate School of Social Work, county directors	Seeking intern for fall 2017
2.1.3 Map and match funders and service providers to unmet community needs on an annual basis in order to identify opportunities for greater impact	Berzonski	Jan 2019	July 2019	Development of a gap analysis	staff time and focus group for community member prioritization	

2. Impact – Strategically leverage resources to best address community needs and invest in opportunities

**2.2 Leverage unrestricted and field of interest funds to demonstrate impact in key areas of regional need**

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
2.2.1 Set multi-year impact priorities based on community needs assessments	Berzonski	Jul 2019	Dec 2019	Establish and market priorities	Staff time and publicity	
2.2.2 Create field of interest funds based on high-level areas of community need (see 1.4.3)	Hencel/ Perkosky	Jan 2020	Jun 2020	The creation of adequate funds to identified priorities	Staff time/planning	
2.2.3 Measure funding impact for promotion and annual meetings with donors	Berzonski	Jan 2020	Dec 2020	Development of infographics for annual report, increased giving	Time, guides, and publicity	
2.2.4 Market and utilize new field of interest funds based on prioritized community needs (see 1.4.3): Number of new funds: 1.FY 2019: 2 2.FY 2020: 3 3.FY 2021: 3 4.FY 2022: 3	Berzonski	Jul 2019	Dec 2022	Hitting the goals of distribution and having the marketing materials	Additional/ reallocated staff and board time	

THG is thinking about Field of Interest Funds that are not donor-advised, but are granted by the CFA Board within the broad area of focus. (e.g. CFW Environmental Fund). CFA may think of semi-restricted funds (such as Sustainable Energy Fund) in addition to when using the term “Field of Interest”.

Both types of funds may be useful for CFA, and both are included in “Field of Interest.”

## 2. Impact – Strategically leverage resources to best address community needs and invest in opportunities

### 2.3 Communicate and package community need to donor advisors

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
2.3.1 Develop collateral on community needs to share at annual donor advisor meetings and with wealth advisor partners	Berzonski	Dec 2019	July 2020	Completion of materials	Staff time and cost of materials	
2.3.2 Utilize annual fund meetings to educate donor advisors in regional need and field of interest funds	Hencel	Jul 2019	Dec 2021	Number of meetings	Staff time and financial resources	
2.3.3 Develop and execute an annual event connecting highest potential donors with grantees to communicate impact, and press	Berzonski	Spring 2018	Spring 2018	Completion of event with coverage	Strategic use of event planning time and financial resources	
2.3.4 Develop and maintain a searchable database of donor advised and field of interest funds for potential givers and donor advisors	Perkosky	Jul 2020	Dec 2020	Communication to donors during development meetings	Build on existing website infrastructure (FIMS Donor Central Module) and financial resources	
2.3.5 Develop and implement “giving circle” programs to convene donors with mutual interests in needs areas	Perkosky/ Hencel	Jan 2021	Dec 2021	Number of giving circles	Staff time, financial resources	

## 2. Impact – Strategically leverage resources to best address community needs and invest in opportunities

### 2.4 Equip our partner agencies to be more effective and efficient

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
2.4.1 Evaluate Bosler Academy business model through a formal business plan and examples of other NPO capacity building structures	Berzonski/Kane	<u>Jul 2017</u>	Dec 2017	Development of a business plan including pricing options	Staff time, outside development support	Underway
2.4.2 Develop logic model and measurable outcomes for Bosler Academy to be as strategic as possible	Berzonski	<u>Dec 2017</u>	Jul 2018	Development of logic model & outcomes	time and outside partnership	
2.4.3 Develop partnerships with higher education institutions to operate and grow Bosler Academy	Berzonski	<u>Dec 2017</u>	Jul 2018	Establishment of ongoing consistent programming	Financial resources	Underway
2.4.4 Grow the membership, reach, and reputation of the Bosler Academy	Berzonski	Jul 2018	Dec 2022	Increased participation and positive feedback	Marketing, money, partnership	
2.4.5 Develop operating model for each county (online, streamed, rotating locations)	Berzonski	<u>Dec 2017</u>	July 2018	Created thru the business plan	Business plan	
2.4.6 Develop and conduct professional seminars and workshops at least quarterly (inside and outside of Bosler)	Berzonski	<u>Jul 2017</u>	Dec 2022	Target number?	Staff time and financial resources	

## 2.4 Equip our partner agencies to be more effective and efficient

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
2.4.7 Conduct feasibility analysis to determine the efficacy of providing technical assistance to organizations in need	Berzonski	Jul 2020	Dec 2020	Results of surveys	Input from Forbes fund,GPNP, survey materials	
2.4.8 Connect partner agencies to state and national resources (e.g. Carnegie Library, PANO)	Berzonski	Jan 2018	Dec 2018	Creation of pathways for organizations to connect	Fund memberships, attendance	ongoing
2.4.9 Investigate opportunities to implement cohort model learning in Bosler Academy	Berzonski	Jul 2020	Dec 2022	Report and recommendation	Staff time	
2.4.10 Develop a strategy to identify and coordinate opportunities for partnerships between organizations	Berzonski	Jan 2019	Dec 2020	Planned events and opportunities	Event planning costs	

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### 3. Promotion – Grow, educate, and engage our donor base through consistent and informative communication

#### 3.1 Advance our brand to gain greater awareness and recognition of impact

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s) (New Funds & Major Gifts)	Resources	Status
3.1.1 Collect and share stories of impact from donor advisors that epitomize our brand	Hencel/Doty	<u>May 2017</u>	Jun 2018	Number of stories written; Story shares, clicks, likes, reach	Donors and staff commitment	Ongoing
3.1.2 Utilize the Strategic Plan vision and priorities to advance our brand for CFA	Kane/ Berzonski	<u>May 2017</u>	Jun 2018	Consistent use of value statement; documented increased community awareness	Materials and staff commitment	Ongoing
3.1.3 Develop messaging and visuals around the brand and test with key stakeholders	Berzonski	<u>May 2017</u>	Jun 2018	Responses from marketing committee & stakeholder approval	Material generated; committee time; design money; financial resources	Started
3.1.4 Develop a strategy to launch a multimedia marketing campaign	Berzonski	<u>Jun 2017</u>	Aug 2017	Work product & approval of marketing committee	Material generated; committee time; design money; financial resources	Underway
3.1.5 Develop collateral that is consistent with marketing campaign to present at various venues	Berzonski	<u>Dec 2017</u>	Jun 2018	Prioritizing material; finished product	Material generated; committee time; design money; financial resources	Underway
3.1.6 Target niche publications aligned with funding priorities/fields of interest/scholarships	Doty	<u>Jul 2017</u>	Jul 2018	Creation of a list of contacts	Time to develop	



### 3. Promotion – Grow, educate, and engage our donor base through consistent and informative communication

#### **3.2 Develop and execute targeted and comprehensive marketing campaigns to engage multi-generational audiences**

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s) (New Funds & Major Gifts)	Resources	Status
3.2.1 Identify and segment all relevant markets by target demographics (see CFA's Growth Tactics Planning Schedule)	Perkosky	<u>Jan 2017</u>	Aug 2017	Creation of a user friendly & final action schedule	Staff input, time, and potential online app	Underway
3.2.2 Identify optimal media by segment (social media, radio, television, etc.)	Berzonski/Doty	<u>Jul 2017</u>	Dec 2017	Media plan	Staff time and knowledge	Underway
3.2.3 Develop marketing collateral (including testimonials) for donors, donor advisors, and other relevant targets	Berzonski	<u>Dec 2017</u>	Jun 2018	Production of materials	Print and design money	
3.2.4 Develop county-specific marketing plans and strategies	Berzonski	Jan 2018	Jul 2018	Marketing committee approval and work product	Additional/ Reallocated staff and committee time	
3.2.5 Develop and execute nursing home seminars and similar events targeting seniors	Hencel/Nelson	<u>May 2017</u>	Dec 2018	Number of seminars and events; new contacts	Staff time and event planning cost	CFA attending Elder Care Workshops
3.2.6 Facilitate peer-to-peer conversations among satisfied planned givers	Hencel	<u>Jan 2017</u>	Dec 2018	Number of contacts	Staff time	Ongoing

### 3.2 Develop and execute targeted and comprehensive marketing campaigns to engage multi-generational audiences

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s) (New Funds & Major Gifts)	Resources	Status
3.2.7 Develop strategy to engage past interns for testimonials and networking opportunities	Berzonski	Aug 2018	Dec 2019	Number of testimonials; volunteer commitment	Staff & YPI time	
3.2.8 Increase professional engagement through county leadership programs	County Directors	<u>Jun 2017</u>	Dec 2018	Get on the agenda of county leadership programs; explore further options	Partner with Chambers of Commerce and YPA	
3.2.9 Involve past scholarship recipients in marketing value of scholarship funds	Berzonski/ Perkosky	<u>Mar 2017</u>	Dec 2018	Story placements	Students	Ongoing

### 3. Promotion – Grow, educate, and engage our donor base through consistent and informative communication

#### 3.3 Become a recognized pillar of our community through earned media opportunities

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
3.3.1 Leverage and promote thought leadership on county needs (see 2.1)	Berzonski	<u>Jan 2017</u>	Dec 2022	Meetings/ media placements	Staff time	Ongoing
3.3.2 Cultivate and nurture relationships with reporters by meeting with key reporters/writers two-to-four times each year	Doty/Kane	<u>Jul 2017</u>	Dec 2022	Meetings and improved relationships; creation materials to bring to meetings	Staff time and white paper	
3.3.3 Select and curate a few high-impact, ready-made stories for local media & niche outlets each year	Doty/Hencel	<u>Jan 2017</u>	Dec 2022	Stories & feedback	Reallocated staff time	Ongoing
3.3.4 Connect satisfied donors and grantees with media outlets	Doty/Hencel	<u>Jan 2017</u>	Dec 2022	Stories & feedback	Staff time	Ongoing
3.3.5 Write at least four op-eds in newspapers and magazines each year	Doty/Kane	<u>Jan 2017</u>	Dec 2022	Placements in each county	Staff time & input	Ongoing
3.3.6 Develop a “Will Week” or “Leave a Legacy” campaign, engaging attorney and advisors for a week of discounted advising	Berzonski/ Hencel/Kane	<u>Sept 2017</u>	Jun 2018	Number of new bequests that we know	Reallocated staff time	

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#### 4. Capacity – Optimize internal operations to achieve our strategic goals

##### 4.1 Develop and sustain an organizational structure that embraces and aligns with strategic goals

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
4.1.1 Train development staff in major gift and planned gift solicitation tactics	Kane	<u>May 2017</u>	Dec 2017	# of trainings, with a built out schedule	Sales training, financial resources and staff time	Underway
4.1.2 Conduct cost-benefit analysis of adding a wealth management expert to boost rapport with other professional advisors	Kane/Eyer	<u>Dec 2017</u>	Jun 2018	Go/No Go decision from executive committee	Research from other CFs	
4.1.3 Review duties to maximize time available for donor services staff to interact with donor advisors	Kane	<u>Jun 2017</u>	Dec 2017	Annual reviews	Staff time	Reviews completed
4.1.4 Conduct cost-benefit analysis of adding an office manager/COO to assist Executive Director	Kane/Eyer	<u>Jul 2017</u>	May 2018	Go/No Go decision from executive committee	Staff time	Underway
4.1.5 Conduct cost-benefit analysis of adding a CFO position to create a comprehensive internal finance department	Kane/Eyer	<u>Jul 2017</u>	Apr 2018	Go/No Go decision from executive committee	Staff time	Underway
4.1.6 Develop succession plans for all key staff members	Kane/Exec Cmte	Jun 2019	Dec 2019	Identification and implementation of plan	Staff time	
4.1.7 Conduct cost-benefit analysis of adding a separate communications position to better service Bosler and other programs	Kane/Exec Cmte	April 2018	Jun 2018	Report to executive committee in light of how Bosler evolves as grant or CFA program	Staff time and dedicated financial resources	Underway
4.1.8 Review county-level staff structure for opportunities to improve efficiency and effectiveness, including dedicated Cambria County staff	Kane/Exec Cmte	Jan 2018	Jun 2018	Report to executive committee	Staff time	

#### 4. Capacity – Optimize internal operations to achieve our strategic goals

##### 4.2 Provide staff with the tools and technology necessary to achieve strategic goals

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
4.2.1 Conduct a space needs assessment	Kane	<u>Jan 2017</u>	Jun 2017	3,000 to 4,000 sq ft of space needed	Mike's time	Done
4.2.2 Conduct cost-benefit analysis of all facility opportunities	Kane	<u>May 2017</u>	Jun 2018	Identifying space opportunities and costs	Mike's time	Underway
4.2.3 Update phone system to alleviate donor frustration	Nelson	<u>May 2017</u>	Jun 2017	New phone system in place	N/A	Done
4.2.4 Review and assess scholarship software	Perkosky	<u>Jan 2019</u>	Jun 2019	Assess if it's needed at this time	Staff time	
4.2.5 Engage FIMS for regular training refreshers	Charney/Kane	<u>Jun 2017</u>	Dec 2022	# of opportunities for training interest from staff, monthly check-ins	Financial resources and staff time	Tentative September date
4.2.6 Conduct cost-benefit analysis of the FIMS Donor Central module	Charney/ Hencel	<u>Jul 2017</u>	Jun 2019	Recommendation from staff	Financial resources and staff time	Conf Call set August 2017 to explore module benefits
4.2.7 Assess website content and functionality and compare to content/functional requirements	Berzonski	<u>March 2017</u>	Jan 2022	How current site is/latest technology	Financial resources and staff time	Ongoing

#### 4. Capacity – Optimize internal operations to achieve our strategic goals

##### 4.3. Ensure our processes and practices promote optimal operations

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
4.3.1 Formalize standard operating procedures to ensure operational continuity	Kane	<u>May 2017</u>	Dec 2017	Policy material/ National Standards Renewing	Existing national standards in-house policies, staff input	In process
4.3.2 Conduct cost-benefit analysis of instituting minimum fund requirements and other policies related to contributions to reduce burden on staff	Kane/Hencel/ Charney	Jan 2018	April 2018	Understanding of internal costs, report to exec committee	Staff time, Council on Foundations data	
4.3.3 Establish and maintain optimal internal communication plan to coordinate county-level activities	Kane	<u>May 2017</u>	Apr 2018	Operational plan	Staff time, input	Ongoing
4.3.4 Assess and improve remote access and communication technology for cross-county collaboration	Nelson	<u>May 2017</u>	Apr 2018	Upgraded technology	Financial resources; staff time; tech support	New phones in place, more to come

#### 4. Capacity – Optimize internal operations to achieve our strategic goals

##### 4.4 Position us for long-term financial health

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
4.4.1 Conduct comprehensive review of financial investment impact on operational budgets to assess long-term sustainability	Kane/Exec Cmte	Jan 2018	Feb 2018	Review of historic and multi-year projections, fee structure	Staff time	
4.4.2 Identify necessary revenue targets (grants or earned income) for operations through grants, unrestricted funding, or service fees	Kane/Charney	<u>March 2017</u>	Dec 2017	Annual/Multi-year revenue	Annual budgeting process	Ongoing
4.4.3 Develop a set of criteria and process to determine effectiveness of programs and operations, and execute an annual review of programs (see 4.3.2)	Kane	Jan 2019	Jun 2019	Baseline comparison with other CFs and recommendations	Council on Foundations	



#### 4. Capacity – Optimize internal operations to achieve our strategic goals

##### 4.5 Align our governance practices with strategic goals

Objectives	Champion/ Support*	Start Date	Completion Date	Measure(s)	Resources	Status
4.5.1 Align board committees to the priorities of the Strategic Plan	Exec Cmte/ Kane	<u>Oct 2017</u>	Dec 2017	Proposal to board	Staff time	
4.5.2 Equip board for success in fundraising through recruitment, training, and development	Exec Cmte/ Kane	<u>Oct 2017</u>	Dec 2017	Board engagement	Board development training; financial resources	
4.5.3 Leverage current and past board members as ambassadors of the Strategic Plan to stakeholders	Exec Cmte/ Kane	<u>Jul 2017</u>	Jun 2018	Reporting plan to the community	Staff time	Underway