

DELAWARE VALLEY GRANTMAKERS
2013–15 STRATEGIC PLAN FRAMEWORK

SPARKING SOLUTIONS

FOR GREATER PHILADELPHIA

INTRODUCTION

For 25 years, Delaware Valley Grantmakers (DVG) has supported and strengthened regional philanthropy with information, ideas and connections that foster community and advance the shared purpose of more effective giving. As philanthropy has grown, changed and demonstrated significant results, DVG has kept pace, adapting activities to interests and trends, while maintaining a core focus on regional needs, the best philanthropic practices and promoting the advantages of joint learning and action.

Using a thoughtful and clear roadmap to guide DVG's work has been an essential component of our long-term record. The value of a solid plan can be seen in the successful outcomes of the last plan crafted in 2006: membership stability and growth, including in the counties surrounding Philadelphia; the popular *Fundamentals of Smart Grantmaking* educational series; a fresh website; publication of *Commonwealth Giving* and *Philanthropy in Pennsylvania*; and beginning diversification of revenue sources, among other accomplishments.

Changed circumstances required a new plan. The planning process undertaken in 2012 was illuminating and energizing for DVG's board and staff— identifying strengths and weaknesses, assessing expectations and performance, balancing aspirations with the capacity to deliver. We asked what members and community leaders want to accomplish and how DVG could help.

The new strategic plan framework reflects the voices and perspectives of DVG's many stakeholders; it also responds to our observations of needs and opportunities across the Greater Philadelphia region and trends in philanthropy across the nation.

KEY FINDINGS

Emerging National Trends in Philanthropy

- Acting bigger & adapting better to achieve impact
- Collective/collaborative philanthropy
- Cultivating the next generation of grantmaking professionals
- Leveraging the Internet and social media for good
- Diversity, equity and inclusion in philanthropy

Top DVG Member Interests

- Evaluating the impact of our grantmaking
- Evaluating grantee performance and outcomes
- Finding good information on nonprofits in region
- Telling a compelling story about our work
- Developing trustee/staff knowledge/skills

Key Informant Observations

- DVG is respected and appreciated for its role as educator, conversation-starter and connector
- The recession's lasting impact on philanthropy and society presents a compelling need and opportunity for DVG to pursue its unique and important mission
- The region would benefit by DVG's increased communication, thought leadership and collaborative action for good

From this research, several findings and conclusions stand out as having important implications for DVG:

- > philanthropy and nonprofits will continue to feel the aftershocks of the economic downturn for years to come;
- > funders are increasingly driven by data and a desire to forge solutions and achieve greater impact;
- > significant advances in our work will only come with persistence, communication and partnership among philanthropies and with other sectors;
- > philanthropy must build a track record of civic leadership to spur cooperative action; and
- > regionally, DVG is expected to play a stronger part in informing and inspiring philanthropy to fulfill the role of collaborator and catalyst for change.

The new strategic plan framework is far-reaching, though realistic in terms of what DVG is and what it can accomplish. It is forward-looking, yet also rooted in the original promise and premise of DVG. Funders created DVG to help members do their best giving—individually and collectively.

Simply put, there would be no reason to operate a network of regional funders if we did not believe that there are larger benefits derived from philanthropy working together so that the whole is greater than the sum of its parts.

Henry Ford, auto magnate and philanthropist co-founder of the Ford Foundation, observed:

Coming together is a beginning.

Keeping together is progress.

Working together is success.

By this measure, DVG surely has made great progress, as points of pride abound from 25 years of keeping together as a regional network of funders. Our longevity is a critical reminder that while the philanthropic scene changes over time, the true value of regional philanthropy is its staying power.

Now we are focused squarely on working together to realize more impact from philanthropy and tackle problems in our region that are bigger and more complex than any one funder—or philanthropy by itself—can solve alone. It's a tall order, but we believe that the commitment, relationships, knowledge and results that philanthropic organizations have built over time offer a strong platform to achieve success for DVG and for the Greater Philadelphia region.

2013–15 DVG STRATEGIC PLAN FRAMEWORK

Vision

We envision a strong, vibrant and sustainable future for the Greater Philadelphia region, in which philanthropy is renowned and valued for catalytic, constructive and collaborative actions that provide opportunities for the greater good and help solve longstanding social problems.

Mission

To inform and inspire philanthropy that sparks solutions and heightens the quality of life in the Greater Philadelphia region.

Guiding Values

- > **Empathy.** We care deeply about the well-being of the people in our region. Philanthropy is better because it is driven by this personal and professional passion.
- > **Excellence.** We strive to meet the highest standards of quality in all activities in service to members and to the region. Excellence means innovation, relevance and responsiveness. Excellence drives results.
- > **Accountability.** We are responsible for actions—and inactions—in pursuit of our mission. Transparency is an essential component of accountability, so our decision-making and communications are clear and candid. We invite inquiries and ideas that challenge our performance.
- > **Leadership.** We embrace the privilege and commitment to be a force for good of our region.
- > **Partnership.** We believe in the power of partnership and collaboration to achieve change. Members and staff strive to work together and to be fair and effective partners, with one another and across sectors with other organizations in our region.
- > **Inclusiveness.** We know that incorporating a diversity of viewpoints, experiences and abilities into our work, makes for richer learning and more effective action.

Strategic Goals

1. Deliver knowledge, tools and opportunities that propel an active and diverse membership network to learn, grow and give more effectively.
2. Foster philanthropy that shapes solutions and has a strong, measurable impact.
3. Elevate awareness and understanding of philanthropy's social and economic value in our region.
4. Achieve long-term financial strength and organizational sustainability.

STRATEGIC DIRECTIONS

DVG is fortunate to enter its next stage on a solid foundation. Building on the reach of the network, the high satisfaction marks members regularly award, its principled public reputation and the progress achieved during the past decades, DVG will strive to be a better version of its current self. As we continue to

improve on core strengths of member networking, service and education, regional knowledge and connections, and management practices, we will work together to become a leader in sharing information about local philanthropy and catalyzing philanthropic impact.



Effective Giving and Growth

GOAL 1: Deliver knowledge, tools and opportunities that propel an active and diverse membership network to learn, grow and give more effectively.

This is the essence of our association, where a wide range of philanthropic organizations and individuals find common purpose and unique value when and how they need it. DVG remains the sole organization in Greater Philadelphia that represents the full breadth of philanthropy and is dedicated to informing and inspiring regional philanthropy to be its best. As the explosion of resources from and for the philanthropic sector threatens to overwhelm us, we will cut through the clutter to provide the most relevant, quality offerings that add value to members' work. We also will call on members to contribute the information, know-how and energy that are essential to ensuring that DVG delivers what the network needs most. And we will emphasize and pursue the multiple meanings of the growth we seek: in learning, in practice and in numbers.

Over the life of the plan, key initiatives to look for in pursuit of this goal are:

- > A stronger mix of inter-connected skill- and issue-based and "big idea" educational and networking programs that are expressly developed for our members' priority interests

- > Regular assessment of members' feedback to inform future programs and services
- > Tools and techniques for easier access to and exchange of relevant information across the network
- > Active recruitment of new members, including a targeted expansion of membership eligibility to broaden philanthropic reach and connections

We will know we are achieving this goal when:

- > Member satisfaction and retention rates ($\geq 90\%$) remain high
- > Program evaluations are positive with reportable impacts on members' giving practices
- > Members are participating at high rates in a broad range of activities
- > Membership is growing and reflects the diversity and dynamism of philanthropy in the region



Solutions and Impact

GOAL 2: Foster philanthropy that shapes solutions and has a strong, measurable impact.

DVG will be intentional and explicit about acting to encourage and enable members to spark solutions and achieve impact with their philanthropy—individually and collectively. This will mean informing members and the larger community with the best thought leadership from the philanthropic field, inspiring with practical examples and lessons from around the region and across the country, and uniting with policymakers, nonprofits and business organizations that are already focused on critical issues to offer the philanthropic perspective and share resources. In short, this is where learning meets action, leadership meets partnership, and personal passion meets professional responsibility.

Over the life of the plan, key initiatives to look for in pursuit of this goal will be:

- > Program series exploring a range of approaches to achieving individual and collective philanthropic impact
- > Funders with common interests coming together to pursue collective action
- > Identifying regional problems and issues on which philanthropy can move the needle
- > Cross-sector forums and conversations aimed at collaborative learning and problem-solving
- > Purposeful alliances and partnerships that complement and advance our work
- > An accessible online database that captures regional grantmakers' experiences and findings to help inform members' investments
- > Reporting successes in achieving philanthropic impact

We will know we are achieving this goal when:

- > Members are working collaboratively with one another through DVG and with community colleagues to solve problems
 - > Funder groups are focused on learning *and* action, and report tangible accomplishments
 - > Evaluation data documents the positive impact of philanthropy-supported initiatives and is shared with key audiences
 - > Civic colleagues and nonprofit leaders recognize the work of DVG and its members as a “force for good”
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Communicating Philanthropy's Value

GOAL 3: Elevate awareness and understanding of philanthropy's social and economic value in our region.

The social and economic value of philanthropy in our region is too little understood, which diminishes our influence and undermines our ability to affect real change. Raising awareness about philanthropy's role in forging community solutions better positions DVG to identify common ground and mobilize key partners—including nonprofits, media, government and donors themselves—for cooperative action. Our aim will be to develop and disseminate more of the stories and data about regional philanthropy to explain what it can and cannot do, to highlight its positive impact and foster learning even when results come up short.

Communications will occur under the banner of a new organizational brand. We will explore options for a more contemporary and energetic name, tag line and graphic identity that better expresses *who* we are, *where* we are and *what* we stand for. This re-branding will be an important tool to power and connect the plan's initiatives.

Over the life of the plan, key initiatives to look for in pursuit of this goal will be:

- > New brand identity that conveys our place, people, purpose and passion and pumps energy into our communications and actions

- > A 25th anniversary commemoration that reinforces the brand, honors the legacy and introduces the future of DVG
- > Regular "state of regional philanthropy" reports and other relevant research to place essential data in the hands and minds of donors, media, nonprofit and civic leaders
- > Communications that feature more contributions by and about members' work
- > Targeted dissemination of philanthropy-related information, observations and stories of impact

We will know we are achieving this goal when:

- > DVG is a "go to" resource for relevant, reliable and meaningful information about philanthropy in the region
 - > Members are actively sharing information about their philanthropic purposes, activities and results
 - > Readership and interest in DVG communications is high
 - > Recognition and awareness of the new organization brand and members' philanthropic initiatives grows among key stakeholders
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Organizational Strength

GOAL 4: Achieve long-term financial strength and organizational sustainability.

For any strategic plan to be successful, it is critical that professional capacity and appropriate physical and technological resources are available to carry it out. DVG can only realize its promise with a strong staff team, supplemented with specific talent and expertise as needed; adequate facilities to fulfill the educational and convening mission; and up-to-date communication and information storage and retrieval systems. A culture of membership and partnership that encourages and facilitates participation, collaboration and contributions in many forms is essential for DVG to attain its strategic goals and cement its role and value in the Greater Philadelphia region.

Over the life of the plan, key initiatives to look for in pursuit of this goal will be:

- > Leverage DVG's 25th anniversary and new plan to raise visibility and obtain resources matched to the mission, goals and strategies
- > Create a culture of members giving beyond dues
- > Generate more revenue from diverse sources, including service providers to the

nonprofit and philanthropic sector that benefit from a strong DVG

- > Maintain a fair and competitive dues schedule that is reviewed on an ongoing basis
- > Offer a variety of volunteer opportunities for members to engage with DVG in meaningful work
- > Secure appropriate meeting space and technology
- > Adopt enhanced governing practices to ensure strong board leadership and effectively marshal knowledge, talents and resources of board and other volunteer leaders

We will know we are achieving this goal when:

- > Core operating expenses are reliably covered
- > "Catalyst funding" is available to start and support strategic initiatives
- > Revenue sources are more diverse and many members are giving beyond dues
- > Board and executive leadership and staff, working together with members and partners, are visible, active and effective in achieving all strategic goals

CONCLUSION

With this plan framework, we have pinpointed our desired destination: a stronger Greater Philadelphia where philanthropy is acting and recognized as a catalyst for positive change. We know the direction in which we will move: powering up DVG's abilities to inform and inspire in strategic areas vital to our members and to our region.

As we proceed, we will be focused yet flexible, covering some familiar territory and sometimes taking the road less traveled, all the while expecting and accepting some detours along the way. Our guiding values will serve as signposts along

the chosen routes: enforcing high standards, offering transparency about our work, accepting responsibility, stepping up and reaching out—our progress fueled by the hope and privilege of philanthropy.

Please join in the journey. Contact any DVG board or staff member to share reactions and ideas and get involved. Working together, we can achieve the success envisioned for our association and for our region. We promise an effort and an adventure worthy of the trailblazers who created DVG 25 years ago.

METHODOLOGY

- 14 key informant interviews with members and sector leaders
- 96 member survey responses
- Five intensive Board and staff planning sessions
- Environmental scan of national trends and best practices
- Comparative analysis of other leading regional grantmaker associations

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