MISSION

We strengthen Greene County by empowering individuals of all backgrounds to support charitable causes for generations to come and provide leadership to address community needs.

VISION

Greene County will be a friendly, vibrant, and prosperous community where a culture of giving positively impacts our quality of life.

VALUES

Stewardship and sustainability – We preserve and protect the legacy of our donors and ensure that their gifts impact Greene County for years to come.
Long-term impact – We prioritize long-term success in order to achieve our ambitious vision.
Transparency and integrity – We earn and honor the trust of our donors, grantees, and other community partners through our actions.
Partnerships and collaboration – We work with others throughout Greene County and beyond to achieve our vision of a thriving community.

STRATEGIC INITIATIVE AREAS 2019—2023

Development and Donor Services

Empower individuals to have an impact through growth and stewardship of funds and creation of a culture of giving

1.1. Diversify and grow new donor relationships to generate funds and endowments

1.2. Enhance stewardship efforts to grow existing endowments and funds

1.3. Cultivate a county-wide culture of giving

1.4. Expand foundation staff and infrastructure to support growth and stewardship efforts

Grantmaking

Foster a thriving Greene County through strategic and impactful investments

2.1. Enhance impact on vision through transformational grantmaking

2.2. Maximize impact across all regions of the County

2.3. Celebrate and promote impact of meaningful grantmaking

Community Leadership

Demonstrate and cultivate leadership on issues impacting Greene County quality of life

3.1. Equip local nonprofit leaders with tools and training for professional and organizational development

3.2. Foster collaboration among community leaders to address issues important to the future of the County

3.3. Prepare our Board of Directors for best practice leadership and governance

1. **Development and Donor Services –** Empower individuals to have an impact through growth and stewardship of funds and creation of a culture of giving

1.1. Diversify and grow new donor relationships to generate funds and endowments					
Objective	Champion	Start	Finish	Resources	Status
1.1.1. Convene a focus group of existing donors understand their discovery of the foundation to inform growth efforts	Bettie	Quarter 3 2019	Quarter 3 2019		
1.1.2. Continue to build relationships with attorneys and wealth advisors 1.1.2.1. Develop and maintain database of attorneys who refer donors 1.1.2.2. Develop and maintain database of wealth management advisors who refer donors 1.1.2.3. Host annual event to celebrate attorneys and wealth advisors who assist with planned giving	Bettie Development Staff Intern (Database)	Quarter 1 2020	Ongoing	$1,000	
1.1.3. Leverage Board to identify major gift prospects	Board Development Staff	Quarter 1 2020	Ongoing		
1.1.4. Consider ways to target donors without children or direct beneficiaries	Bettie Board Development Staff	Quarter 1 2020	Ongoing		
1.1.5. Position Executive Director and/or selected Board Members for speaking engagements throughout the county	Bettie Board	Quarter 3 2020	Ongoing		

1.1.6. Conduct prospecting activities frequently enough to increase the total number and value of gifts: 1.1.6.1. Target/approach 223 individuals quarterly 1.1.6.2. Conduct 23 conversations quarterly 1.1.6.3. Present to 12 people quarterly 1.1.6.4. Close on 10 new funds quarterly	Bettie Development Staff	Quarter 1 2019	Ongoing	Approach, Qualify, Present Analysis Model	
1.1.7. Enhance Planned Giving through targeted outreach: 1.1.7.1. Develop expertise on avenues for planning giving 1.1.7.2. Conduct 5 planned giving conversations quarterly 1.1.7.3. Conduct 5 conversations with Wealth Advisors quarterly 1.1.7.4. Conduct 5 conversations with estate attorneys quarterly	Bettie Board Development Staff	Quarter 2 2019	Ongoing		
1.1.8. Update internal policies and procedures regarding planned giving	Bettie An'Etta	Quarter 1 2019	Quarter 2 2019	See 1.1.10.	
1.1.9. Create educational materials on the value of giving to a community foundation and distribute as needed	Bettie An'Etta	Quarter 1 2020	Ongoing		
1.1.10. Develop issue-specific or geography-specific Giving Circle opportunities to deeply engage new donors in the development and grantmaking process	Bettie Development Staff	Quarter 2 2021	Ongoing	Community Builders and other Alumni	

1.1.11. Grow unrestricted assets by encouraging IRA contributions and non-endowed or endowed operating funds, possibly through promotion of an unrestricted giving campaign	Bettie Board	Quarter 1 2019	Quarter 4 2023		
1.1.12. Grow total assets to fund operational expenses** 1.1.12.1. 2019: $5.1M 1.1.12.2. 2020: $5.1M 1.1.12.3. 2021: $6.5M 1.1.12.4. 2022: $7.8M 1.1.12.5. 2023: $9.1M	Bettie Board	Quarter 1 2019	Quarter 4 2023		

**Figures in this objective are tentative and based on calculations in the Cost/Activity Project Excel Workbook developed by The Hill Group and provided to CFGC.

1.2. Enhance stewardship efforts to grow existing endowments and funds						
	Objective	Champion	Start	Finish	Resources	Status
1.2.1.	Review and enhance annual (or more frequent) investment reports for current donors	Bettie	Quarter 3 2019	Ongoing		
1.2.2.	Develop metrics and evaluation criteria to review performance of investment managers on a regular basis	Bettie Board	Quarter 4 2019	Quarter 4 2019		
1.2.3.	Conduct annual philanthropic review meetings with 100 percent of current donors to: • Gauge satisfaction • Educate about county needs • Promote continuous engagement • Encourage further giving	Bettie Development Staff	Quarter 3 2019	Ongoing		
1.2.4.	Review and triage donors for growth potential based on outcomes from philanthropic review meetings	Bettie Development Staff	Quarter 3 2019	Ongoing	See 1.3.3.	
1.2.5.	Utilize new donor management database to track donors and have more regular communication	Bettie An'Etta Development Staff	Quarter 4 2019	Ongoing	See 1.1.7.	
1.2.6.	Host an annual event (possibly invite donors to awards ceremony) to connect donors with grantees to communicate and celebrate impact	Bettie Board	Quarter 1 2021	Annually	$2,500	

1.3. Cultivate a county-wide culture of giving					
Objective	Champion	Start	Finish	Resources	Status
1.3.1. Develop and distribute electronic quarterly newsletter highlighting stories of grant recipients	Bettie An'Etta Intern	Quarter 1 2020	Ongoing	See 1.1.8.	
1.3.2. Host at least one public philanthropy celebration annually, possibly as part of the annual stewardship event or an existing event in the county	Bettie	Quarter 1 2021	Annually	See 1.3.6.	
1.3.3. Develop and host annual Greene County Day of Giving 1.3.3.1. Assess cost-benefit of "low-tech" vs. "high-tech" Day of Giving, including software costs and fees 1.3.3.2. Partner with major funders and organizations to promote dollar matching campaigns 1.3.3.3. Develop marketing collateral as needed to promote	Bettie Board Development Staff	Quarter 1 2020	Quarter 3 2020	See 1.1.7., 1.1.8. $10,000	
1.3.4. Develop a youth philanthropy program targeted to high school students from all school districts	Bettie	Quarter 2 2020	Quarter 4 2020		
1.3.5. Develop a young professional philanthropy organization or initiative	Bettie	Quarter 4 2020	Quarter 2 2021		

1.4. Expand foundation staff and infrastructure to support growth and stewardship efforts						
	Objective	Champion	Start	Finish	Resources	Status
1.4.1.	Increase Executive Director weekly hours from 32 hours a week to 40 hours a week	Board	Quarter 1 2019	Quarter 1 2019	$12,000 additional	
1.4.2.	Increase Administrative Assistant weekly hours from 35 hours a week to 40 hours a week	Bettie	Quarter 1 2019	Quarter 1 2019	$8,000 additional	
1.4.3.	Hire additional part-time staff member to take on administrative tasks	Bettie Board	Quarter 2 2019	Quarter 2 2019	$16,000	
1.4.4.	Hire additional staff member for development	Bettie Board	Quarter 1 2021	Quarter 1 2021	$63,000	
1.4.5.	Review and re-assign responsibilities of full-time staff to maximize time available for fundraising and stewardship	Bettie	Quarter 1 2019	Quarter 1 2019	See 1.1.1. and 1.1.2.	
1.4.6.	Develop intern structure to be utilized for marketing and promotional materials	Bettie An'Etta	Quarter 1 2019	Quarter 2 2019		
1.4.7.	Purchase new donor management software system	Bettie	Quarter 4 2019	Quarter 1 2019	$12,000 – $18,000	
1.4.8.	Obtain email campaign software	Bettie An'Etta	Quarter 1 2021	Quarter 1 2021	$1,000	
1.4.9.	Improve online giving portal to enable more web-based donations from current and future donors, including recurring gifts	Bettie	Quarter 2 2019	Quarter 3 2019		
1.4.10.	Develop standard operating procedures for national accreditation renewal	Bettie An'Etta	Quarter 1 2019	Quarter 3 2019		

2. Grantmaking – Foster a thriving Greene County through strategic and impactful investments

2.1. Enhance impact on vision through transformational grantmaking					
Objective	Champion	Start	Finish	Resources	Status
2.1.1. Partner with Waynesburg University and other community agencies to develop annual report on "the state of Greene County" to inform grantmaking	Bettie	Quarter 1 2020	Quarter 4 2020 Update Annually		
2.1.2. Provide ongoing training for board and staff on critical community needs or opportunities	Bettie Board	Quarter 2 2020	Ongoing		
2.1.3. Set multi-year impact priorities based on critical community needs or opportunities	Bettie Board	Quarter 1 2021	Ongoing		
2.1.4. Consider establishment of multi-year grants aligned with critical community needs or opportunities	Bettie Board	Quarter 1 2021	Ongoing		
2.1.5. Develop educational opportunities for community members on writing large-scale grants and providing large-scale programming and events	Bettie	Quarter 1 2021	Ongoing		
2.1.6. Secure funding for larger grants that will have a greater impact on the county and community	Bettie Board Development Staff	Quarter 3 2021	Ongoing		
2.1.7. Establish expectations and requirements for grantees receiving larger, transformational grants to ensure effective use of funds	Bettie Board	Quarter 3 2021	Quarter 3 2021		

2.2. Maximize impact across all regions of the County					
Objective	Champion	Start	Finish	Resources	Status
2.2.1. Recruit 3-5 new Board members to have representation from all parts of the County	Bettie Board	Quarter 1 2019	Quarter 4 2019		
2.2.2. Expand Grantmaking Committee to have 3-5 committee members from all parts of the County	Bettie Board	Quarter 3 2019	Quarter 1 2020		
2.2.3. Ensure Community Builders program has representation from various parts of the County	Bettie Board	Quarter 3 2019	Ongoing		
2.2.4. Solicit and receive funds from all parts of the county 2.2.4.1. Setup at least three monthly meetings with potential new donors outside of Waynesburg 2.2.4.2. Develop at least three new partnerships with nonprofits serving different parts of the County	Bettie Board	Quarter 1 2020	Quarter 4 2020		
2.2.5. Develop grantmaking criteria and evaluation system that helps to ensure county wide fund distribution, if possible	Bettie Board	Quarter 1 2019	Quarter 3 2019		

2.3. Celebrate and promote impact of meaningful grantmaking						
	Objective	Champion	Start	Finish	Resources	Status
2.3.1.	Foster connection between donors and recipients by enhancing opportunities to bring both groups together	Bettie	Quarter 1 2019	Ongoing		
2.3.2.	Host annual celebration to recognize scholarship recipients	Bettie Board	Quarter 3 2021	Annually	$2,500	
2.3.3.	Demonstrate impact that existing funds have had on the county through strategic marketing (Social Media, include in Newsletter)	Bettie Intern	Quarter 3 2019	Ongoing	See 1.4.1.	
2.3.4.	Host grantmaking celebration after each grant cycle	Bettie Board	Quarter 1 2019	Ongoing		

3. Community Leadership – Demonstrate and cultivate leadership on issues impacting Greene County quality of life

3.1. Equip local nonprofit leaders with tools and training for professional and organizational development					
Objective	Champion	Start	Finish	Resources	Status
3.1.1. Develop a formalized series of continuing education workshops for local nonprofit leaders, possibly including: • Grant Writing • Board Engagement • Governance • Volunteer Recruitment	Bettie	Quarter 3 2019	Ongoing	$2,000	
3.1.2. Develop opportunities for targeted capacity building through cohort model training	Bettie	Quarter 3 2021	Ongoing		
3.1.3. Expand Community Builders program to include more participants each year	Bettie	Quarter 3 2020	Ongoing		
3.1.4. Utilize partnerships to assist with leadership and capacity training (PANO, Grantmakers of Western Pennsylvania/Meet the Grantmakers)	Bettie	Quarter 3 2021	Ongoing		

3.2. Foster collaboration among community leaders to address important issues to the future of the County						
	Objective	Champion	Start	Finish	Resources	Status
3.2.1.	Host bi-annual meetings to convene organizations where partnership opportunities may exist (horizontal, vertical, and others)	Bettie Board	Quarter 3 2019	Ongoing		
3.2.2.	Consider starting a Greene County Nonprofit Network	Bettie	Quarter 3 2021	Quarter 4 2021	$5,000	
3.2.3.	Redesign grant proposal weighting to consider extra points for collaborative approaches	Bettie An'Etta	Quarter 3 2019	Quarter 4 2019		
3.2.4.	Utilize newsletter to promote cross-County events and programs	Bettie An'Etta Intern	Quarter 1 2019	Ongoing	See 1.4.1.	

3.3. Prepare our Board of Directors for best practice leadership and governance					
Objective	Champion	Start	Finish	Resources	Status
3.3.1. Recruit 3-5 new Board members from desired partner organizations that can provide strategic input (University researchers, fundraising experts, marketing experts)	Bettie Board	Quarter 3 2019	Quarter 4 2019		
3.3.2. Establish an annual Board giving target and achieve 100% annual board giving, possibly considering a Board Planned Giving initiative	Bettie Board	Quarter 1 2019	Updated Annually		
3.3.3. Provide Board with bi-monthly update on County and general community foundation information	Bettie	Quarter 1 2019	Ongoing		
3.3.4. Create annual opportunity for Board interaction with County leaders and elected officials	Bettie Board	Quarter 3 2021	Annual		
3.3.5. Partner with organizations that provide ongoing Board leadership and development opportunities (PANO, Bayer Center for Nonprofit Development)	Bettie	Quarter 4 2019	Ongoing		