Our **Vision** (What we want for the Eastern Panhandle) is to build vibrant communities that provide opportunities for everyone living in the Eastern Panhandle of West Virginia.

Our **Mission** (What we do for the communities we serve) is to inspire philanthropy, serve donors, strengthen communities, and improve the quality of life in Eastern West Virginia now and for future generations.

We **Value** (What underpins and informs our work) diversity, provide exceptional stewardship, and fully embrace accountability, integrity, professionalism, and transparency in everything we do.

**History and Profile**

In 1995, in the tradition of most community foundations, a handful of citizens in West Virginia’s Eastern Panhandle established a community foundation to benefit Morgan, Berkeley, and Jefferson Counties. In 2006 and 2007, affiliates for Hampshire and Hardy Counties were established. A volunteer Board of local citizens, advised by legal, accounting and banking professionals, guides and directs the Eastern West Virginia Community Foundation (EWVCF) and its programs.

EWVCF serves all types of donors — individuals, families, corporations, and other nonprofit organizations. We take a leadership role in the community, partnering with local universities, the United Way, neighboring private foundations, and others to build knowledge, promote dialogue, and act on priority issues across Eastern West Virginia. The Community Foundation has developed strong relationships with professional advisors and local banks, establishing a crucial and meaningful communication system with donors who have charitable values upon which they wish to act.

Over the past 26 years, EWVCF has served as a conduit for millions of dollars to stay in the eastern region of West Virginia, and has leveraged additional funding from outside the community. The Community Foundation has a reputation for being reliable and honest, and has a track record of carrying out the wishes of its donors who feel a sense of personal reward. Nonprofits in the community write better proposals as a result of coaching and assistance and have bolstered capacity thanks to a variety of training programs and workshops. As a result of grantmaking, classrooms have more resources, community members have improved access to dental care, high school graduates have scholarships to attend college, and youth have improved education and recreation opportunities, to name just a few impacts.

EWVCF currently has three staff members: Michael Whalton, executive director, Amy Pancake, director of affiliates, and Karin Hammann Dunn, program manager. A full-time office manager-administrative assistant will be hired in 2021. Currently, EWVCF holds over 250 component funds and manages more than $32 million in assets.

This plan outlines six high priority goals for the next four years. While these goals directly impact affiliates in Hampshire and Hardy Counties, many of the objectives and tactics are specific to the Tri-County area with the hope and expectation that each affiliate will develop strategic plans focusing on its own service area.
Eastern West Virginia Community Foundation Strategic Plan 2021 - 2024

Goal #1: Design and implement effective and impactful grant and scholarship programs

Objective 1.1: Increase annual grants and scholarships to $1.5 million, with unrestricted grants of at least $100,000 - 2024
Strategic Plan 1.1.a. Use NIP tax credits to build Community Impact Funds - ongoing
Strategic Plan 1.1.b. Earmark a portion of annual net income as matching funds to inspire donors to build their county’s Community Impact Fund – ongoing
Strategic Plan 1.1.c. Share information regarding unfunded grant proposals with donor advised fund advisors – 2021 and ongoing

Objective 1.2: Increase the impact of grantmaking at the community foundation
Strategic Plan 1.2.a. Implement programs with clear goals, plans, benchmarks, and ways to evaluate success
Strategic Plan 1.2.b. Encourage DAF advisors to award all available recommended distributions annually
Strategic Plan 1.2.c. Market to new donors a variety of field of interest endowments to expand grantmaking.

Objective 1.3: Award more unrestricted grants using trust-based philanthropy to streamline grantmaking.
Strategic Plan 1.3.a. Evaluate how EWVCF compares to best practices in the community foundation arena.
Strategic Plan 1.3.b. Explore collaboration with United Way and other funders in order to create more resources and a less complicated grantmaking process - 2021

Objective 1.4. Highlight, expand, and promote successful grant programs
Strategic Plan 1.4.a. Invite grantees to report to the board with a “show & tell” of what they’ve accomplished –
Strategic Plan 1.4.b. Host an Impact Night event where selected grantees publicly showcase their work – 2022
Strategic Plan 1.4.c. Using unrestricted funds, expand youth grantmaking programs beyond Berkeley County

Committees Responsible: Grants and Scholarships. Staff Responsible: Michael, Karin, Amy

Goal #2: Increase assets under management to $45 million, including $2 million in unrestricted funds, by December 2024.

Objective 2.1: Heighten the public profile of EWVCF and its Affiliates through a targeted campaign highlighting our mission, vision, and values.
Strategic Plan 2.1.a. Draft three to five success stories per year and disseminate, via social media, print media, radio, Board ambassadorship. etc
Strategic Plan 2.1.b. Make at least four presentations annually to area Civic Organizations, Service Clubs, and local business development groups, including ones to two new organizations annually to provide Community Foundation updates, State of Philanthropy reports, and to strengthen general awareness.
Strategic Plan 2.1.c. Expand our social media strategy by utilizing Facebook, Twitter, EWVCF website, eNews, and emails by increasing the foundation’s e-mail donor database by 15% annually and building Facebook followers to more than 1,200
Strategic Plan 2.1.d. Continue outreach and “friendraising” events such as the annual Scholars & Donors Reception, the Emeritus Council & Nonprofit Leaders Luncheon, and the Partners in Philanthropy Mini-Grants to Teachers Receptions, with a goal of generating positive PR for the Foundation and for our corporate partners
Strategic Plan 2.1.e. Continue publication of high-quality Annual Report to the Community
Strategic Plan 2.1.f. Review all printed and promotional materials, and update as needed

Committee Responsible: Marketing and Community Awareness Staff Responsible: Michael, Amy

Objective 2.2: Increase awareness of EWVCF among nonprofit organizations, peers, and key professional advisors in the community and region
Strategy 2.2.a. Meet with nonprofit executive leaders and boards to encourage them to establish or add to agency endowments at the foundation.
Strategy 2.2.b. Maintain active membership in service organizations, the Tri-State Estate Planning Council, the Association of Fundraising Professionals, Philanthropy WV, WVNPA and other associations as appropriate.
Strategy 2.2.c. Meet with technical advisors at least annually, and preferably more often to discuss how EWVCF might help them meet the needs of their clients.
Strategy 2.2.d. Present, host, or sponsor, quarterly educational programs and workshops for other nonprofits, professional advisors, peers, and members of regional associations.

Staff Responsible: Michael, Karin, Amy

Objective 2.3: Ensure that EWVCF is providing good stewardship and investing our assets to maximize gains while doing so in the most cost-effective and conscientious way.
Strategy 2.3.a. Research Socially Responsible Investments and consider adding as a separate investment option in addition to our traditional investment pool outlined in our Investment Policy Statement - 2021
Strategy 2.3.b. Evaluate the effectiveness of the loan to the Natural Capital Investment Fund

Committee Responsible: Investment Staff Responsible: Michael

Goal #3: Inspire donors to build endowed funds to support favorite nonprofit organizations and charitable causes.

Objective 3.1: Add staff and upgrade fund accounting software to provide enhanced donor stewardship.
Strategy 3.1.a. Survey peer community foundations about how they are staffed – by December 2021
Strategy 3.1.b. Develop job description for new hire based on peer survey research – 2022

Objective 3.2: Increase Legacy Society membership to 110 by December 2024 (current membership is 84).
Strategy 3.2.a. Annually reach out to at least 10 professional advisors with materials about the legacy society
Strategy 3.2.b. Meet with at least one long-standing donor each month to discuss legacy giving plans
Strategy 3.2.c. Pursue partnership opportunities for gift annuities, remainder trusts, lead trusts, and other ways to help donors benefit themselves and the endowments of their favorite charities. – ongoing

Objective 3.3: Improve donor relations by scheduling meetings, encouraging dialog between board members and donors, and expanding donor events to appeal to a more diverse population in the community.
Strategy 3.3.a. Schedule 12 meetings and at least one donor event per year.
Strategy 3.3.b. Work with technical advisors to offer educational workshops and seminars for donors

Objective 3.4: Cultivate relationships with large, corporate entities.

Committee Responsible: All Board Members Staff Responsible: Michael and Amy

Goal #4: Embrace Community Leadership.

Objective 4.1: Deepen awareness and create conditions to support diversity, equity and inclusion
Strategy 4.1.a. Create a taskforce to explore ways that the foundation can effectively address the issues of diversity, equity, and inclusion in the region and in our own organization. - 2021
Strategy 4.1.b. Based on taskforce recommendations, offer appropriate DEI workshops and seminars.

Objective 4.2. Research, identify, and address areas of critical concern in the community.
Strategy 4.2.a. Work with other anchor institutions such as colleges and universities, hospital systems, school boards, and private foundations to address our communities’ most critical needs. - 2022
Strategy 4.2.b. Convene like-minded groups as needed. – ongoing
Strategy 4.2.c. Help other nonprofit organizations share their success stories addressing the areas of critical concern – ongoing
Staff Responsible: Michael and Amy

Objective 4.3: Provide support to local nonprofits to enhance their programming, fundraising and other skills

- Strategy 4.3.a. Present Community Workshops & Nonprofit Training, with 2-4 programs offered annually
- Strategy 4.3.b. Continue to publish eNews with stories of interest to nonprofit organizations and grow the subscriber base to more than 1,000 – once or twice monthly
- Strategy 4.3.c. Pursue a matching fund challenge to help local charities build local endowment – annually

Objective 4.4: Develop a program to educate and engage municipalities and counties in the region

- Strategy 4.4.a. Ask to meet and make presentations to town, city, and county councils on an annual basis.
- Strategy 4.4.b. Encourage the establishment of endowed funds by government agencies.

Committee Responsible: Executive Committee  Staff Responsible: Michael, Amy, Karin

Goal #5: A diverse, knowledgeable and engaged Board leads the Community Foundation

Objective 5.1: Recruit and retain diverse, talented, and committed board members who reflect strategic plan priorities

- Strategy 5.1.a. Develop and use a board recruitment matrix based on organizational values and strategic plan goals to help focus recruitment efforts
- Strategy 5.1.b. Develop introductory information with clear expectations about board service to share with prospective board members
- Strategy 5.1.c. Utilize committee participation as a way to cultivate prospective board members
- Strategy 5.1.e. Promote Emeritus Leadership Council to keep former board members involved
- Strategy 5.1.f. Explore ways to create a pathway for board membership for young adults

Objective 5.2: Ensure that all board members are equipped to meet the expectations of board membership

- Strategy 5.2.a. Provide a comprehensive orientation for new board members
- Strategy 5.2.b. Provide ongoing board education and conduct an annual board survey

Objective 5.3: 100% of the Board members support the foundation with a gift of some size each year

- Strategy 5.3.a. Encourage participation in challenge and matching fund opportunities
- Strategy 5.3.b. Promote the Legacy Society during board meetings and one-on-one opportunities
- Strategy 5.3.c. Discuss options like donating a Traditional IRA to create a legacy gift
- Strategy 5.3.d. Make individual, personal appeals to each board member regarding annual giving

Committee Responsible: Governance  Staff Responsible: Michael and Amy

Goal #6: Effective and efficient staff and operational systems serve the Community Foundation.

Objective 6.1: The organization continues to meet National Standards as developed by peers in the industry.

- Strategy 6.1.a. Renew National Standards and keep them up to date thereafter.

Objective 6.2: The Foundation is adequately staffed by competent, engaged professionals

- Strategy 6.2.a. Add a full-time Office Manager – Administrative Assistant to the Martinsburg office. – 2021.
- Strategy 6.2.b. Develop succession plans for key staff, beginning with Executive Director position
- Strategy 6.2.c. Provide at least two continuing education opportunities for all staff members annually
- Strategy 6.2.d. Continue membership in peer organizations

Objective 6.3 Annual operations of Foundation are adequately funded.

- Strategy 6.3.a. The Foundation’s Administrative Endowment offsets expenses by 12% annually.
- Strategy 6.3.b. Administrative Fee income covers 70% of annual operating expenses.
- Strategy 6.3.c. Corporate sponsorship program offsets expenses by 10% annually. Committee Responsible: Executive

Staff Responsible: Michael