



DELAWARE VALLEY  
GRANTMAKERS

# STRENGTHENING PHILANTHROPY, STRENGTHENING COMMUNITIES

A Strategic Plan for  
**DELAWARE VALLEY GRANTMAKERS**  
2006-2009

# FROM THE PRESIDENT

The field of philanthropy is changing. The needs of our communities are increasingly urgent and complex. There is a greater call for grantmakers to be accountable and transparent in our work, assuring those who have placed their trust in us that we are acting with integrity and purpose. The mechanisms for philanthropy are also changing as traditional foundation structures are no longer the only means for individuals to distribute their wealth for the public good.

Delaware Valley Grantmakers is uniquely positioned to help those in our region who are committed to helping others through philanthropic work. Since 1988, DVG has supported diverse grantmakers through networking, knowledge and professional development. In 2006, the time was right to undertake a strategic planning process to investigate how we can better do this work. Through discussion with members, the Board and our nonprofit and private sector partners, DVG identified our core competencies and areas for improvement, as well as external opportunities and challenges. The following plan outlines how we will build on these strengths, take advantage of opportunities, extend our reach and continue to provide effective and relevant services to our members.

Over the next three years, DVG will enhance its position as a philanthropic leader by:

- better representing the breadth of philanthropic activity in our region, increasing our membership and, in turn, the philanthropic giving it represents;
- actively working with our members to share knowledge and best practices, to make grantmakers better able to achieve their strategic goals for the community;
- working with our members to give philanthropy a voice, identity and the ability to collaborate with and influence those in our region, joined by the commitment to create positive change in our community; and,
- increasing our own capacity and business practices to build the framework for measured and sustainable growth.

As a membership organization, our success is demonstrated by the success of our members. This plan reflects the challenges facing our region and philanthropy while thinking broadly about how we can best serve our members, both current and potential, in these changing times.

Bruce Melgary  
Executive Director  
The Lenfest Foundation

# INTRODUCTION

Since its inception in 1988, Delaware Valley Grantmakers has grown and evolved in response to the needs and interests of its members, a total of over 150 member organizations in 2006. These members include: private foundations, charitable trusts, community foundations and donor-advised funds, corporate giving programs and foundations, a variety of grantmaking public charities; and individual donors with significant giving. Members represent the region geographically, concentrated in the five-county region surrounding Philadelphia but extending to neighboring regions and to national grantmakers with significant giving in our area.

Staffed by four full-time professionals and governed by a 20-member Board of Directors who represent the range of types, sizes and focus of the membership, the challenge for DVG is to meet

the needs of members who are diverse in their structure, assets, areas of focus, staffing, geography and point of view. DVG has met this challenge through a thoughtful, strategic approach to programming and communications. Over 30 events and affinity group meetings each year provide opportunities for

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knowledge-sharing on current or emerging issues, skills building, critical dialogues with regional leaders, and networking opportunities; DVG's Web site and monthly e-newsletters provide up-to-date information about philanthropy in our region as well as the field nationally.

DVG also collaborates with local and national funders to convene grantmakers around specific issues. For example, in 2005, DVG received a grant from the Ford Foundation to help inform grantmakers about issues of regionalism and equitable development, which expanded to a 2006 effort focusing on the needs of vulnerable youth in our community. In this case and others, DVG provides the administrative support, networks and local knowledge to engage our members in a national discussion in ways that are relevant to our community.

During the 2005-2006 strategic planning process, DVG worked with consultants from TCC Group, formerly the Conservation Company, to connect with members and other key audiences in order to gain an understanding of their range of experiences and how their needs relate to DVG's future. This research revealed that DVG's key opportunities for enhancing its programs and organizational structure include:

- considering a broader mission with more standards for accountability;
- encouraging more cross-sector networking, broadening its roster of affinity groups and developing more issue-oriented programming;
- strengthening its communications capacity, increasing the depth of its knowledge around public policy issues, strengthening its interaction with the nonprofit community and building its presence in the broader community;
- further developing the diversity, visibility and specific tasks assigned to the Board;
- finding ways to better serve its members outside of Center City Philadelphia through off-site programs and the strategic use of technology; and,
- continuing to develop systems to provide clear, ongoing fiscal information to track progress toward financial goals.

The plan detailed in this document presents four strategic priorities that will move the organization in new directions, strengthen its capacity, engage and expand its membership and provide a voice for philanthropy in the region. While this document covers the period from 2006 through 2009, we believe it sets the stage for DVG's growth well into the future.

# VISION, MISSION, AND VALUES

## OUR VISION

Delaware Valley Grantmakers will deliver high-quality member services while increasing its role as a regional philanthropic leader. In the longer term, DVG, as a civic leader, will serve as a catalyst for community change through engagement of the philanthropic sector.

## OUR MISSION

Delaware Valley Grantmakers builds stronger communities by increasing the impact and the effectiveness of philanthropy.

## OUR VALUES

- We believe that more effective philanthropy results in stronger communities.
- We value our members and serve them by strengthening their knowledge and their practice of effective philanthropy.
- Our effectiveness is directly linked to the positive impact our members and their nonprofit partners have on the issues facing our communities.
- We seek partners in this work and engage diverse voices to build understanding about the issues and opportunities in the region.
- We value learning within our organization and conduct ongoing assessments of the relevance, efficiency and impact of DVG efforts.
- We value our Board and staff for their expertise and commitment to the field, and support them with opportunities for professional growth and development.

In addition, our business practices model the same standards of accountability and transparency that we encourage our members to strive for.

- We are committed to the public good and strive to maintain the public trust.
- We value diversity within our organization, in our membership and with our collaborative partners.
- We are in compliance with the law and act with personal and professional integrity.
- We are responsible stewards of our resources, maintaining structures and processes for effective governance.

# THE ENVIRONMENT

DVG must respond to changes in our region and nationally that affect philanthropy while actively seizing opportunities to expand our reach, sharpen our identity and better serve our members.

DVG will develop its role as a regional philanthropic leader. Leveraging our competitive advantage as the local and regional provider of knowledge and expertise on charitable giving, DVG can better position itself as a philanthropic leader by making itself the key repository and disseminator of research on regional philanthropy. By developing more strategic communications opportunities and connecting members who share common interests and goals, DVG will support members by becoming a strong voice and providing research for grantmakers in the region.

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DVG will provide up-to-date knowledge from a range of sources to inform members about the most pressing issues in philanthropy and civil society. The legislative environment, shifting demographics and a constantly changing political leadership affect the landscape in which grantmakers operate. DVG can

better utilize its resources to collect, distill and distribute objective information about important trends and issues that impact our members' grantmaking.

DVG will develop a culture that is more accessible to and collaborative with organizations in other sectors. DVG can create more opportunities for discussion and action among the philanthropic, nonprofit, public and private sectors. Finding ways to expand programs to encourage more interaction among the sectors can have a direct effect on future partnerships that will have a positive, meaningful impact on our community.

DVG will articulate the essential role it plays in relation to other organizations in the field. DVG must distinguish itself from other national membership organizations that focus on philanthropy by articulating a clear message about our unique role in serving the region. DVG combines knowledge and networking to address pressing local issues, in-depth knowledge of philanthropic practice, and a cohort of peers who can meet face-to-face on an ongoing basis. DVG can also enhance its role as a collaborator and coordinator with other organizations working toward stronger philanthropy and strong communities, such as community foundations, donor-advisors and financial professionals that extend our reach within this growing sector of philanthropy.

# OUR STRATEGIC GOALS

DVG's strategic plan is designed to achieve our mission in this changing environment while staying true to our vision and values. We will build on our strengths but articulate ways in which we can improve our capacity, reach and impact. Members must perceive DVG as valuable to their efforts, those new to philanthropy must see DVG as an invaluable resource and we must maintain the broader picture of philanthropy in the region. We have developed four strategic goals that will guide our efforts over the next several years.

- 1** Provide exemplary service to our members, developing relevant and thought-provoking programs and services that engage and educate members to increase their knowledge and impact.
- 2** Increase the number, range and diversity of DVG members and the proportion of total giving in the region that they represent.
- 3** Give philanthropy a voice, identity and the ability to collaborate with and influence all sectors of the region that are committed to strengthening our communities.
- 4** Strengthen DVG's financial position, capacity and business practices as a foundation for measured, sustainable growth.

**GOAL 1** *Provide exemplary service to our members, developing relevant and thought-provoking programs and services that engage and educate members to increase their knowledge and impact.*

DVG's primary commitment is to our members, therefore our highest priority is to remain relevant and engaging to our membership, ensuring that each member finds value for its dues. Member retention is critical to DVG's financial viability and to its status as the philanthropic leader in the region.

We will maintain current, detailed information about each of our members so that we can better serve their needs. With the goal of maintaining current information about assets, grants, giving areas and special initiatives for our members, DVG will pursue targeted surveys and increased personal contact with members to better assess their satisfaction with our programs and services.

DVG will enhance its current program offerings to meet changing member needs. DVG will utilize members of its Board and its newly-establish Program Committee to provide guidance and perspective on our program offerings. In addition, DVG will explore new partnerships and opportunities to include representatives from other sectors in our work in order to deepen DVG's program services, and investigate cost-effective use of technology to expand our geographic reach.

DVG will improve the effectiveness of member communications. Using the expertise of a newly-formed Communications Committee comprised of Board members and others, DVG will examine our current practices and develop a comprehensive communications plan that will identify the messages and mechanisms for more effective member and external stakeholder communication in the future.

As part of a national effort by regional associations of grantmakers and other vendors, DVG will make more and better resources available to our members. DVG will institute the use of new knowledge management tools being developed by the Forum of Regional Associations of Grantmakers and the National Center for Family Philanthropy that will provide members with online access to an extensive array of information relevant to their work.

**GOAL 2** *Increase the number, range and diversity of DVG members and the proportion of total giving in the region that they represent.*

In order to enhance our role as a philanthropic leader, DVG must represent the range and diversity of philanthropy in the region. DVG's impact on the region through our members and the validity of DVG to represent the 'voice of philanthropy' is tied to its ability to increase the number and diversity of members.

DVG will increase the numbers of members within current membership categories. DVG's Membership Committee will spearhead an outreach effort to increase the number of members in the following categories: mid-to large-size foundations; corporate foundations and corporate giving programs; and small family foundations. DVG will also work to expand our service to members in surrounding counties and investigate expanding membership in under-served areas such as nearby Wilmington, DE.

DVG will increase membership through expanded membership categories. DVG will explore new membership categories including: re-granting intermediaries, donor-advised fund holders, professional advisors and government agencies. DVG will seek opportunities to partner with community foundations and donor advisors to efficiently reach a substantial number of these potential members by providing programs and services designed to benefit this growing sector of philanthropy.

DVG will build its membership in a considered, responsible manner so that organizational capacity can meet the needs of this expanded membership. While DVG has set ambitious goals for expanded membership that will add to the voices represented and extend its reach into new communities, we will take care to assure that we have the capacity to maintain our high level of member services even as the range and scope of members grows.

**GOAL 3** *Give philanthropy a voice, identity and the ability to collaborate with and influence all sectors of the region that are committed to strengthening our communities.*

A strong philanthropic sector is an essential part of the health of our communities. As one partner among many, philanthropy needs to understand its role, the breadth of its reach, areas where there are gaps and issues that require a concerted effort by many. In turn, the broader community needs to understand what philanthropy is already doing, what it cannot do and where there is potential for collaboration.

DVG will increase the effectiveness of our communication with stakeholders outside of our membership. Since the audience for DVG communications extends beyond our membership to others concerned with the same issues, part of our communications plan will address ways to enlighten the broad community about the role of philanthropy in a way that is cost-effective and accessible.

DVG will become the recognized expert on the role and breadth of philanthropic giving in our region. Working with an accomplished research partner, DVG will undertake bi-annual research studies and disseminate this information both within and beyond the membership. Research will focus on the level and areas of giving with an emphasis on in-depth local knowledge; and will seek to address trends over time.

DVG will become a center for philanthropy and nonprofit organizations to address issues of common concern. DVG will seek to create a culture that is more accessible and collaborative, finding ways to encourage open dialogue between grantmakers and grant seekers. In instances where engagement of the philanthropic sector can move a larger agenda forward, DVG will act as a facilitator to bridge discussions among sectors.

DVG will develop criteria and a process for engaging in public policy issues related to philanthropy. DVG will develop a system for engaging in public policy issues specifically related to philanthropy that takes into account the wide spectrum of perspectives regarding social and public policy represented by our members.

DVG will build bridges with the private sector in areas that will strengthen the region through partnership or collaboration. DVG will capitalize on the recent trend toward regional cooperation to ensure that the philanthropic community is represented in discussions on multi-sector approaches to key challenges facing our area.

**GOAL 4** *Strengthen DVG's financial position, capacity and business practices as a foundation for measured, sustainable growth.*

DVG has consistently operated from a strong fiscal position, functioning efficiently with a lean administrative structure and dedicated staff. This must be maintained moving forward to assure sufficient resources to implement the strategic priorities.

DVG will strategically increase the numbers, capacity and expertise of the staff to deliver expanded programs to our members. DVG will ensure that current staff receive adequate professional development in order to accomplish planned service improvements and consider adding new staff and/or utilizing program-based consultants or part-time staff as new initiatives move from the pilot phase into full implementation.

DVG will upgrade its technology platform to enhance operations and member services. DVG will implement a new Web-based knowledge management system that will enhance members' access to online resources, as well as invest in ongoing technology upgrades, maintenance and professional development to assure that systems and staff are ready to support an expanded use of technology as part of member services.

DVG will develop more precise systems for monitoring finances. As programs become more complex, DVG's Finance Committee and executive staff will develop systems for tracking and reporting on the direct and indirect costs associated with each program.

DVG will conduct ongoing assessment of the composition, performance and role of the Board. The DVG Board will establish oversight committees to work with the staff toward accomplishing the strategic priorities and monitor the consistent achievement of the standards and practices which DVG recommends.

DVG will monitor the achievement of the program and financial goals set forth as part of the strategic plan. With direction provided by the Finance Committee, the DVG Board will review progress on the specific performance measures for member retention, recruitment of new members, budget expansion and new sources of revenue detailed in the strategic plan, and work with the staff to adjust the content or timetable of stated goals as required.

# CONCLUSION

We believe that stronger philanthropy will result in stronger communities. The strategic goals detailed in this plan reflect a renewed commitment to exemplary service for our members while broadening our vision to expand DVG's role as a resource and voice for philanthropy.

The challenges facing our region will not be solved by philanthropic efforts alone. Central to this plan is a commitment to building bridges between sectors, rallying our collective resources and knowledge toward effective solutions and a common understanding.

In 2008, mid-way through this plan, DVG will celebrate 20 years of service to the regional philanthropic community. We are proud of the work of DVG and its members that has enabled us to thrive and grow. We welcome these new opportunities for DVG to act as a catalyst for positive change with others in our region who share this vision.

# THANKS

The planning process is often as valuable as its outcome, and we wish to thank the numerous people who devoted their time and energy to the process of creating this plan, especially the DVG Strategic Planning Committee and Board of Directors. Although too numerous to list, our thanks also go to the many people who participated in interviews, discussion groups, surveys and town hall meetings. Your help has made it possible to gather a broader understanding of the community we serve and make this plan an effective roadmap for DVG's future.



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