

# PSW's NEW Strategy Map

## Strategic Statements

## Who, What, Where, Why, and How

### Problems We're Solving

#### Primary Problem

Lack of funder connectedness

#### Secondary Problem

The need for philanthropy to drive meaningful impact on regional issues

### Revenue Sources

	Now	Future*
Membership Fees:	44%	??
Grants and Contributions:	23%	??
Conference Revenues:	18%	??
Corporate Sponsorships:	9%	??
Investment Earnings:	2%	??
Seminar Income:	2%	??
Contract Services:	1%	??
Miscellaneous:	1%	??

\* Board and CEO commit to continue to monitor and evaluate this allocation

**Vision**  
A thriving southwestern US through the power of collaborative philanthropy

**Mission**  
We foster philanthropic excellence and trusted partnerships that impact our region's most pressing issues

**Values**  
Vision, Innovation, Excellence, Collaboration, Diversity, Equity, Inclusivity, Learning

**Big Hairy Goal**  
300 active engaged members by 2022

### Brand Promise

Connected, impactful philanthropy

**WHO**  
we serve

#### Audience:

- Private and community foundations, corporate and operating foundations, individual funders, and trusts

**WHAT**  
we actually do

#### Core Programs & Services:

- Annual conference & other educational offerings
- Membership program & network (including role, geographic, & similar groups)
- Research and other resources
- Policy advocacy

**WHERE**  
we operate

#### Geographic Focus Area(s):

- The southwestern US

**WHY**  
we do what we do

#### Core Beliefs:

- Philanthropy is best when done collaboratively and with excellence
- Our members should generously help each other

**HOW**  
we measure our impact

#### Current Year Goals:

- Complete CEO search
- Grow membership
- Redesign 2019 and 2020 conferences
- Raise \$500k in new capital over 2yrs
- Complete strategic plan after search

## Theory of Change / Logic Model

### Inputs

Members  
Volunteers  
Grants & sponsorships

### Activities

Member services  
Conference & training  
Research & advocacy

### Outputs

Funder connectedness  
Philanthropic learning  
More engaged members

### Impact

Thriving SW region  
Enhanced collaboration  
Better philanthropy