



CASE STUDY:
**Market Research, Strategic Plan, and
Community Engagement**

Situation

Over the past three-plus decades, Community Foundation for the Alleghenies has grown to \$100 million in assets, distributing tens-of-millions of dollars annually to community-serving agencies across Bedford, Cambria, Indiana, and Somerset Counties. CFA needed a new strategic plan to continue its trajectory of success and impact while also planning for mission-based investments, organizational transition and succession, future staffing and board membership, infrastructure and technology, and marketing and branding.

Solution

The Hill Group conducted secondary market research to understand the current and projected trends impacting the multi-county region served by the Foundation, including an assessment of how population loss, wealth transfer, and new post-pandemic realities could impact the Foundation and its constituents. The Hill Group also performed primary research, convening roundtables of donors, grantees, and leaders in each county, deploying online surveys to various stakeholders, and interviewing key supporters and influencers. Research and analysis was provided to Foundation board and staff members in advance of and to inform the strategy development process which was comprised of several facilitated planning retreats designed to envision the future and define and detail the critical steps to achieve it.

Results

- Developed a shared understanding of issues facing the multi-county service area as a result of primary and secondary market research and analysis
- Discussed and gained consensus on the foundation's role to address emerging issues while honoring its own mission and vision
- Defined an ambitious series of goals, objectives, and strategies focused on growth, community leadership, and grantmaking impact
- Identified opportunities to enhance governance and organizational infrastructure to support achievement of ambitious goals

Behind the Scenes

Community Foundation for the Alleghenies has the privilege of serving communities across four distinct and diverse counties in southwestern Pennsylvania. Critical for its success and that of

CLIENT

A \$100 MILLION MULTI-COUNTY COMMUNITY FOUNDATION

INDUSTRY

PHILANTHROPY AND FOUNDATIONS

PROJECT

FACILITATE DEVELOPMENT OF A FIVE-YEAR STRATEGIC PLAN

Critical for its success and that of this strategic planning process was meaningful engagement of various constituents across and within each of the four counties. Long before formal long-term planning commenced, consultants and Foundation staff reviewed research on emerging population and social trends in each county and organized community listening sessions in each county. Input from research and these sessions was used in each planning conversation with Foundation staff and board members to ensure the final plan was responsive to the evolving and emerging needs of those served.

About The Hill Group, Inc.

Founded in 1953, The Hill Group, Inc. is a premier provider of management counsel, specializing in strategy, execution, and measurement. Our team of consultants has deep experience across several industries, enabling our team to draw on best practices from a variety of sectors to help our clients grow, innovate, and achieve maximum potential.

Strategy – *Envisioning an organization’s future, capitalizing on its opportunities, identifying strategic priorities, and implementing positive change.*

- Strategy Development
- Decision Support and Analysis
- Strategic Planning and Management
- Business Planning and Feasibility Assessments
- Mergers, Acquisitions, and Strategic Alliance Planning
- Market Research and Analysis

Execution – *Ensuring that an organization is efficiently and effectively utilizing its resources to its full potential.*


- Process Improvement and Innovation
- Business Model Development and Resource Allocation
- Financial Assessment and Management
- Turnaround, Business Transformation, and Change Management
- Governance Assessment and Development

Measurement – *Increasing an organization’s performance through measurement and continuous improvement.*


- Measurement
- Business Analytics and Intelligence
- Economic Impact Assessment
- Employee Opinion, 360-Degree Feedback, and Service Quality Surveys
- Industry Benchmarking Surveys

Contact Us Today

 info@hillgroupinc.com

 412-722-1111

 www.hillgroupinc.com

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