



*Promoting a Healthier Community*  
**VNA FOUNDATION  
OF GREATER NORTH PENN**



# STRATEGIC PLAN

Outline of Goals and Approaches guiding the  
Foundation from July 1, 2025 through June 30, 2028

*This document was developed as a result of Board surveys and discussions informed by Reporting Conversations with our partners, culminating in a retreat on May 14, 2025. It builds upon goals and approaches determined in the previous Strategic Plan, which guided the Foundation's work from 2022-2025.*

## **Board of Directors- July 1, 2025**

Jerry Sag, President

Robin Chambers Dixon, Vice President

Neal Pearlstine, Treasurer

Kathy McCarter, Secretary

Mateen Afzal, Gerry Cocchiaro, Dave Crosson, Curt Deardorff, Anne Frank, Anthony Johnson, Bud Leister

## **Staff- July 1, 2025**

Diana Loukedis Doherty, Executive Director

Joanne O. Kline, Program Associate



## **Our Mission**

The mission of the VNA Foundation of Greater North Penn is to support the organizations that build stronger and healthier communities in Greater North Penn.

## **Our Values**

In everything we do, the VNA Foundation of Greater North Penn values:

**ALL PEOPLE:** We act with integrity, respect and human compassion for one another and all residents of the North Penn community.

**ALL PARTNERS:** We engage diverse perspectives to foster collaboration and innovative solutions.

**OUR REGION:** Together, we strive for an inclusive North Penn community where everyone has equitable access to health care, basic needs, and healthier outcomes for all.

## **Our Community**

The VNA Foundation of Greater North Penn supports the same geographic region within Montgomery County, PA, that was originally served by the Visiting Nurse Association of Greater North Penn. That area is comprised of the boundaries of three school districts (North Penn, Souderton and Wissahickon) plus Worcester Township.

As the North Penn region continues to evolve, the VNA Foundation seeks to partner with nonprofit organizations that dedicate their efforts to improving the health and well-being of residents of North Penn. While some of our grant partners may serve a broader population, our foundation places priority on those organizations and programs focused on the North Penn region and addressing health access, collaboration, capacity building and basic health needs in our area.

### **Impact Area #1- Ensuring the Increasing Health of our Nonprofit Partners**

**Strategy 1.1** *Provide flexible forms of funding, including general operating support and multiyear grants, to empower grantee partners to direct resources where they need them most.*

- **Approach A:** Communicate the VNAF approach to providing general operating support and multi-year grants in our guidelines and on our website. (Responsible: E.D., ongoing)
- **Approach B:** Regularly elicit feedback from grantees regarding the impact of general operating and multi-year grants on their effectiveness. (Responsible: E.D., Program Assoc./ongoing)
- **Approach C:** Continue to evolve grant processes in alignment with expressed needs and goals of community partners, developing new strategies as appropriate. (Responsible: E.D., Program Assoc., Grantmaking Ctee /ongoing)

**Strategy 1.2** *Welcome new and connect with existing grant partners representing the diversity of the North Penn cultural experience to ensure that all residents of North Penn can enjoy access to health and human services.*

- **Approach A:** Continue to participate in, and identify, venues and events where we are likely to connect with and learn the ideas of culturally diverse nonprofits and community organizations in Greater North Penn. (Responsible: E.D./ongoing)
- **Approach B:** Convene grantee partners at annual breakfast networking event to foster networking and relationships. (Responsible: E.D., Program Assoc., Board/Every Summer)
- **Approach C:** Continue to create opportunities for applicants and grantees to meet with VNAF staff and Board members to discuss diverse community needs and program ideas. (E.D., Program Assoc., Board/ongoing)

**Strategy 1.3** *Continue funding for the Bucks-Mont Collaborative through the 5-year Kitty Fitzgerald Memorial Fund (\$250,000 payable in annual installments of \$50,000 through July 2028) to continue addressing educational, professional and behavioral health needs of nonprofit staff and board members and explore expanding into other areas of potential collaboration.*

- **Approach A:** Regularly meet with Bucks-Mont Collaborative to discuss activities, strategic plans, capacity, and opportunities. (Responsible: E.D., Board /Collaborative's E.D. annually presents updates at VNAF Board meeting)
- **Approach B:** Support Bucks-Mont Collaborative in its efforts to understand the scope of member needs, including training, capacity-building, and management (Responsible: E.D., Board/ongoing)

**Strategy 1.4** *Continue to support and partner with Jefferson Health and Montgomery-Bucks Dental Society to ensure the relevance and viability of the Jefferson Lansdale Hospital Dental Care Access program to maximize access for vulnerable populations*

- **Approach A:** Regularly communicate with program leadership to determine level of support required for program's success to inform budgeting (Responsible: E.D., Board, Julie Paslowski)
- **Approach B:** Regularly assess program's effectiveness and impact. (Responsible: E.D., Board)
- **Approach C:** Consider scenarios for growth, and/or major changes to the program's leadership or structure. (Responsible: E.D., Board and Grantmaking Committee, staff and leadership of Dental Care Access program at Jefferson Health)

## **Impact Area #2- Maximizing the Beneficial Impact of our Funding**

**Strategy 2.1** *Continue and expand user-friendly grantmaking practices, including simplified application and reporting processes, technical assistance to interested applicants, and funding opportunities aligned with our grantees' expressed needs so that grantees can use funds where needed most.*

- **Approach A:** Regularly update application to ensure its relevance and utility for both applicant and staff/Board reviewers, prioritizing accessibility, clarity and brevity. (Responsible: E.D., Program Assoc, Grantmaking Ctee /ongoing)
- **Approach B:** Embed step(s) early in the grants process to assess new applicants' geographic and mission-alignment to reduce likelihood of declined applications.
- **Approach C:** Continue Reporting Conversation practice to strengthen relationships and regularly review reporting process to ensure accessibility, convenience and efficiency, sharing trends with relevant stakeholders. (Responsible: E.D., Program Assoc /ongoing)

**Strategy 2.2** *Pivot our grantmaking practices to nimbly respond to timely needs or opportunities that might arise in our community.*

- **Approach A:** Utilize input gathered in Reporting Conversations with grantees and data from relevant stakeholders to develop annual grants offerings that resonate with expressed organizational needs.
- **Approach B:** Create and communicate annual grantmaking calendar that provides applicants with ample time for pre-application discussion and development. (Responsible: E.D., Grantmaking Ctee)
- **Approach C:** Continually adapt grant review procedures and committee structure to allow for active participation from VNAF Board members and community volunteers in grant decisions and relationships, including reporting conversations and site visits. (Responsible: E.D., Program Assoc, Board/ongoing)
- **Approach D:** Calculate grant payout percentage in relation to annual budget, engaging Finance & Investment Committee and Board in decisions to exceed required 5% payout threshold where circumstances allow. (Responsible: E.D, Finance & Investment Committee, Board/ongoing)

**Strategy 2.3** *Engage and leverage other funders to encourage investment in nonprofit organizations serving Greater North Penn for both ongoing and urgent health and human service needs.*

- **Approach A:** Actively participate in Bucks-Mont Collaborative, North Penn HUB, Greater Montgomery County Chamber of Commerce Nonprofit Council and other relevant meetings/information sources to deepen relationships and keep abreast of news and trends affecting the North Penn region beyond what we learn from Reporting Conversations. (Responsible: E.D, Program Assoc./ongoing)
- **Approach B:** Continue to represent and promote Greater North Penn's interests through active participation in funders' gatherings, including Philanthropy Network Greater Philadelphia and Bucks-Mont Funders Group. (Responsible: E.D./ongoing)
- **Approach C:** Explore opportunities for pooled funding initiatives to reduce duplication of effort by both grant seekers and funders and meet timely regional needs. (Responsible: E.D., Program Assoc./ongoing)

**Impact Area #3- Prioritizing Trust Between VNAF, Our Grantee Partners,  
and Community Members**

**Strategy 3.1** *Continue and enhance the high-touch, personalized approach to our work that will lead to even deeper and more authentic relationships with our grant applicants and partners.*

- **Approach A:** Continue communicating this approach in our materials and outreach, both with prospective/current grantee organizations and with other funders to encourage trust-based giving in our region. (Responsible: E.D.)
- **Approach B:** Regularly offer opportunities for Board members to interact with grantees to enhance relationships and build greater understanding of their needs, including but not limited to Board Discretionary grants, Board participation in site visits, reporting conversations and Annual Breakfast, and grantee participation in select Board meetings and gatherings.
- **Approach C:** Regularly evaluate the implications of high-touch approach for VNAF staff and volunteer capacity, creating efficiencies wherever possible. (Responsible: E.D., Program Assoc., Exec. Ctee and Board/ ongoing)

**Strategy 3.2** *Maintain credibility with our partners by reviewing our infrastructure and Board/staff/volunteer capacity to ensure we have the tools needed to realize our mission.*

- **Approach A:** Actively attract and engage diverse participation on the VNAF Board and committees to ensure that a wide range of perspectives (immigrant community, underrepresented ethnic groups, diverse age groups, people with disabilities, etc.) inform and influence VNAF priorities and practices, and to engage expertise in areas identified as relevant to the work of the Board.(Responsible: E.D., Exec. Ctee, Governance Committee and Board/ongoing)
- **Approach B:** Embed succession-planning discussion into Executive Committee meetings and annual review of Executive Director, to ensure transparency and accountability around leadership transitions.
- **Approach C:** Regularly evaluate the structure and makeup of VNAF staff, Board and committees to ensure effectiveness and relevance, clearly communicating any changes to grant partners. (Responsible: E.D., Program Assoc., Exec. Ctee, Governance Ctee, and Board/ ongoing)