

Smith & Connors

Greater Cincinnati Foundation

Website Strategy R1

March 5, 2025

Introduction

Greater Cincinnati Foundation and Smith & Connors have embarked on a project to create a new website.

This document represents a new strategic vision for the website that will inform a more detailed content strategy in R2.

Strategic Process

The goal of this strategy is to articulate the new vision for the site and prepare the team for the content, design, and development phases. Each round builds upon the previous one, adding specificity to agreed-upon directions.

Round 1

Audience and goals

Strategy foundations, articulation of your goals and audiences

Current sites audit and assessment

Looking at your current sites

Strategy recommendations

New approach to information architecture and establish a high-level content strategy

User journeys

Technology and SEO audit

Plugins, features, and SEO analysis report

Round 2

Refine the strategy, incorporating your comments from R1

Content outlines for all pages/page types.

Design strategy

Moodboards to get direction on design

Taxonomy recommendations for any taggable/filterable content

Technical and functional

recommendations, including new or modified features to accommodate new content and storytelling requirements

Launch considerations

Round 3

Revise and deliver **final strategy report** based on your feedback

Separately, we will use your feedback from R2 content outlines to present a **library of components** that will make up your new site. We'll present this to you on a call to talk through features and functionality, and align on the launch MVP (minimum viable product) for this first phase.

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SECTION 1

Strategic Foundations

Problem Statement

Greater Cincinnati Foundation's website has been a valuable tool, but it no longer fully supports the user experience and storytelling needs required to showcase GCF's impact, engage key stakeholders, and reflect the foundation's vision for the future.

To better serve your community and deliver a first-class user experience, the new website must prioritize an updated content strategy, dynamic storytelling and an intuitive, flexible content management system that empowers the communications team to share GCF's story with greater clarity and impact.

Core Messaging

Your core brand messaging is at the heart of every decision, from strategy to design to user experience.

Mission

We connect generous donors with trusted nonprofits to create a vibrant Greater Cincinnati where every person has a fair opportunity to thrive.

Vision

We are working to create a vibrant Greater Cincinnati where every person has a fair opportunity to thrive.

Values

Trust	Because relationships are our most important resource.
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Generosity	Because generosity builds a stronger community.
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Growth	Because we are always a work in progress.
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Equity	Because one size really doesn't fit all.
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Goals & Objectives

During Discovery we surfaced overarching goals for the website and how they ladder down to some key objectives. We can track the success of those objectives after launch.

	Amplify GCF's Brand & Strategic Messaging			Enhance Website Experience & Accessibility		Foster Greater Engagement & Improve Customer Service		
OBJECTIVES	Live into new strategic messaging across the full site	Showcase GCF's dynamism through compelling storytelling	Ensure that audiences "see themselves" in giving	Smooth user journeys for GCF's many audiences	Simplify content so audiences can easily find what they're looking for	Build a stronger donor pipeline by making it easier to start a fund and to more deeply engage existing donors	Support the nonprofit community with improved experience and pathways	Engage professional advisors/ businesses by showing opportunities for collaboration & investment
SUCCESS METRICS	Increase dwell time on key brand pages	Increase dwell time/clicks for stories	Survey or anecdotal feedback on brand clarity	Decrease bounce rate on priority pages	Consistent use of key pathways	Increase in new donor inquiries as result of website and existing donors who engage in website	Better engagement (dwell time, lower bounce rate) for nonprofit sections	Increase in inquiries attributed to website

Brand Personality Drivers

The Rooted Partner

A steadfast champion of community well-being. GCF evokes a calm center even in times of change.

Stable (but not static)

Trusted

Transparent

Stewardship-Focused

Knowledgeable

Purposeful

Reliable

The Curious Collaborator

Always asking questions, listening, and sharing, we're open to new ways forward we can co-create.

Strategic

Approachable

Data-Driven

Forward-Focused

Dynamic

Insightful

Agile

The Community Amplifier

Welcoming all audiences, GCF strives to elevate those who are providing the resources and doing the work.

Inclusive

Empowering

Catalytic

Passionate

Expansive

Open

Empathetic

Experience Principles

Purposeful and Positive

We create a welcoming digital space that **encourages visitors to take the next step with optimism**, whether they're donors, nonprofits, or community partners. Buttons and calls-to-action guide users toward the right resources with clarity. Every element says, "You belong here—let's get started."

Polished and Approachable

GCF's brand role as a trusted advisor shines through polished design and smart content while your tone of voice of warmth is also there, striking a balance between "we know our stuff" and "we love learning with you." GCF is a reliable steward — and also open and curious.

Clear and Self-Guided

The site anticipates user needs, with simple navigation, clear language, and straightforward pathways. The visuals make the experience engaging, but never at the expense of clarity. Users always know where they are and how to progress, reinforcing a sense of control and confidence.

Energetic and Forward-Looking

From motion cues in the interface to the vitality in the storytelling, we show GCF is an organization that's actively shaping what comes next for Greater Cincinnati. **Dynamic elements highlight your innovative side, balancing out design choices that reflect your stability.**



SECTION 2

Audience Articulation

Overview

We start with an analysis of GCF's audience groups to help guide our strategic approach. We base our analysis on information provided by your team.

The whole point of a website is to serve your audiences. We want to ensure that we understand them deeply so we can craft an experience that anticipates and satisfies their needs, both functional and emotional, and leads them to action.

Target Audiences Overview

We have identified the following groups as primary and secondary audiences.

Primary Audiences

Donor Prospects →

Existing Donors →

Professional Advisors →

Businesses & Institutions →

Nonprofits & Civic Leaders →

Secondary Audiences

General Public →

Internal Stakeholders →

Donor Prospects

Who are they?

High-net-worth individuals who are passionate about the region and who have not yet opened a fund or formalized giving with GCF.

They may be new to the concept of a community foundation or unsure how GCF is different from other giving options.

Needs/Wants

- Tax-wise giving solutions that also have an impact
- Clear understanding of the donor experience
- Connection to trusted nonprofits and community initiatives
- Transparent info about personalized services
- Multigenerational planning for philanthropy
- Intro to community foundations (what they do, why they're beneficial and differentiated from DAFs and Fidelity/Schwab, etc.)

Fears/Concerns

- The fees compared to other DAF providers
- Perceived “agenda” that might clash with their personal priorities
- Not sure how their funds flow through GCF
- Unsure if they ‘fit in’ (am I the right size donor?)
- Confusion about philanthropic jargon or complexity

Brand Takeaways

- “GCF will amplify the impact of my giving.”
- “I’m joining a welcoming, informed community of donors.”
- “I can recognize people like me in the current donors at GCF.”
- “GCF is a trusted steward that aligns with my charitable interests.”
- “I can navigate the giving process with ease—even if I’m new to a community foundation.”

What we want them to do?

- Open a fund or reach out to learn about next steps
- Explore stories of giving — see themselves in
- Refer peers who might also benefit from GCF’s approach

Existing Donors

Who are they?

High-net-worth individuals who are passionate about the region and already have a fund or philanthropic relationship with GCF.

They typically manage their giving through GCon and receive newsletter updates, but have fewer reasons to visit the public website regularly.

Needs/Wants

- Seamless access to Giving Connection
- Insights into local needs and community issues
- Updates on new initiatives, community successes, and GCF activities
- Tools & resources for deepening their philanthropic journey

Fears/Concerns

- Can't find info (or find confusing info) on managing their fund
- Missing out on community updates or new giving opportunities
- Feeling disconnected from GCF's broader impact (and the larger philanthropic community)

Brand Takeaways

- "GCF is my partner beyond fund setup — always ready with relevant insights and resources."
- "I have continuous opportunities to maximize my philanthropy and see real impact."
- "There's a rich community of fellow donors and nonprofits I can connect with if I want to do more."

What we want them to do?

- Return to the website for stories, reports, or new giving options
- Explore advanced or alternative giving avenues (e.g., planned giving, special initiatives)
- Stay informed and proudly share success stories with others
- Reach out for help or guidance as philanthropic goals evolve

Professional Advisors

Who are they?

Financial planners, tax experts, and wealth managers who guide high-net-worth clients on philanthropic strategies. Some already know about community foundations, while others need to learn why GCF might be a stronger local option than national providers like Schwab.

Needs/Wants

- Philanthropic expertise and flexible giving solutions that enhance their client relationships
- Toolkit resources to share with clients
- Networking & educational opportunities (workshops, events) to grow expertise and influence
- Clear explanation of what sets GCF apart from national donor-advised fund providers

Fears/Concerns

- That GCF could compete for client relationships
- Perception that GCF may push an “agenda” or have fees that don’t align with the advisor’s recommendations

Brand Takeaways

- “GCF is a trusted partner—an ally, not a competitor, in serving clients’ philanthropic goals.”
- “We provide robust educational resources to help advisors deepen client relationships.”
- “Our expertise in local giving, impact, and multigenerational philanthropy adds value to an advisor’s offering.”

What we want them to do?

- Engage with GCF as a go-to partner for philanthropic strategies
- Refer clients to GCF
- Utilize toolkits and attend GCF workshops or networking events
- Share our thought leadership with their client base

Businesses & Institutions

Who are they?

Local corporations—both large (e.g., Procter & Gamble) and mid-sized (e.g., Gorilla Glue, Paycor)—as well as smaller businesses seeking ways to enhance community impact, attract talent, and align with CSR initiatives. Often, these companies have staff or committees dedicated to philanthropy and employee engagement.

Needs/Wants

- Tax-wise, PR-friendly philanthropic solutions
- Streamlined partnerships to manage corporate giving (back-office support, administrative help)
- Brand & employee engagement opportunities (showing employees and the public a commitment to local well-being)
- Proof of impact

Fears/Concerns

- Uncertainty about how GCF's services benefit their bottom line or align with business objectives
- GCF mainly serves individuals/families, not corporations
- Lack of clarity on cost-effectiveness and process
- Concern that outsourcing philanthropy might reduce control or connection

Brand Takeaways

- "GCF is the philanthropic partner of choice for businesses in Greater Cincinnati—offering proven expertise, flexible options, and strong local connections."
- "We make corporate giving seamless—from tax-efficient structures to on-the-ground impact."
- "Partnering with GCF enhances your brand and helps attract top talent who value community involvement."

What we want them to do?

- Partner with GCF
- Validate their interest by reading testimonials or success stories
- Explore how GCF can handle philanthropic administration (back-office support) while preserving a company's unique vision
- Reach out for a consultation to tailor solutions

Nonprofits & Civic Leaders

Who are they?

Nonprofits: Local organizations delivering programs and services, often seeking grants or connections with donors.

Civic Leaders: Elected officials, chamber of commerce members, and regional policymakers who influence broader community initiatives and may partner with GCF on key projects.

Needs/Wants

- Clear pathways to funding or collaboration
- Clarity on GCF's focus areas and how/when funding is made
- Community-wide data and updates
- Transparent info on how GCF supports nonprofits beyond just dollars (connections, thought leadership, etc.)

Fears/Concerns

- Limited access to GCF donor base or unclear alignment with GCF's strategic priorities
- Uncertainty around how funding decisions are made (concerns over gatekeeping or relationship-based decisions)
- Excessive complexity or jargon

Brand Takeaways

- "GCF is a transparent, collaborative partner for progress."
- "Even if funding is directed by donors, GCF can amplify needs and connect nonprofits to potential supporters."
- "We offer clear, equitable processes—from RFP timelines to digital applications—that reduce confusion."

What we want them to do?

- Apply for funding (with the right information)
- Explore resources on GCF's site
- Collaborate with GCF on community-wide efforts
- Reduce reliance on staff calls/emails by self-serving through straightforward web tools and FAQs

General Public

Who are they?

Residents of the Greater Cincinnati region who may not directly engage with GCF as donors or nonprofit partners, but are impacted by GCF's community investments. They could be curious about how local philanthropy works, or simply want to see their region thrive.

Needs/Wants

- Thriving communities with visible improvements in quality of life
- Basic understanding of how a community foundation functions and the value it adds

Fears/Concerns

- Distrust of institutions and wealthy donors, unsure if funds truly benefit everyone
- Lack of transparency about how decisions are made or where money goes
- Unclear how they could fit into the philanthropic conversation (i.e., "Why should I care?")

Brand Takeaways

- "GCF is a transparent, community-focused foundation committed to the region's well-being."
- "Even if I'm not a donor, GCF's work positively impacts my community."
- "There's nothing hidden about what they do—they share stories, data, and impact openly."

What we want them to do?

- Learn more and share about GCF's initiatives and regional impact
- Trust that GCF's leadership and donors work in the community's best interest
- Recognize how anyone can be part of building a stronger Greater Cincinnati—whether by volunteering, sharing success stories, or simply staying informed

Internal Stakeholders

Who are they?

Greater Cincinnati Foundation's employees and board members—both long-standing and newer folks—who represent the organization publicly and rely on the website for up-to-date info and resources.

Needs/Wants

- Fast, reliable access to institutional knowledge
- Ability to refer donors, nonprofits, or advisors to relevant pages without confusion
- Consistent, accurate messaging so external communications and presentations reflect the latest details
- A user-friendly CMS

Fears/Concerns

- Outdated content or a cumbersome site that slows them down
- Inconsistent messaging leading to confusion with audiences
- Lack of trust in the site as a resource

Brand Takeaways

- “The GCF website is our go-to resource for accurate information.”
- “I’m inspired and proud to be a part of this organization, which is an integral part of what makes this community special.”
- “We can confidently send people to pages that show our impact.”
- “The site works for us, supporting daily operations, presentations, and storytelling.”

What we want them to do?

- Use the site as a primary reference
- Direct inquiries from various audiences to relevant pages
- Trust the site's content and effectiveness
- Reinforce brand consistency by aligning all materials and conversations with the website's messaging and tone

Audience Insights

Seeing themselves in the story

The site needs to be a mirror. Each audience wants to know “Do I belong here? How do I fit?” A prospective donor might ask if they’re “big” enough to be here, and a nonprofit might wonder if they are relevant to GCF’s focus areas or to its donors.

Proof of impact & tangible outcomes

Across the board, there’s a need for concrete success stories, data, and real examples — both to show donors their money is making a difference and to demonstrate to the general public that GCF benefits the broader community. Professional advisors also rely on this data to help guide and encourage clients.

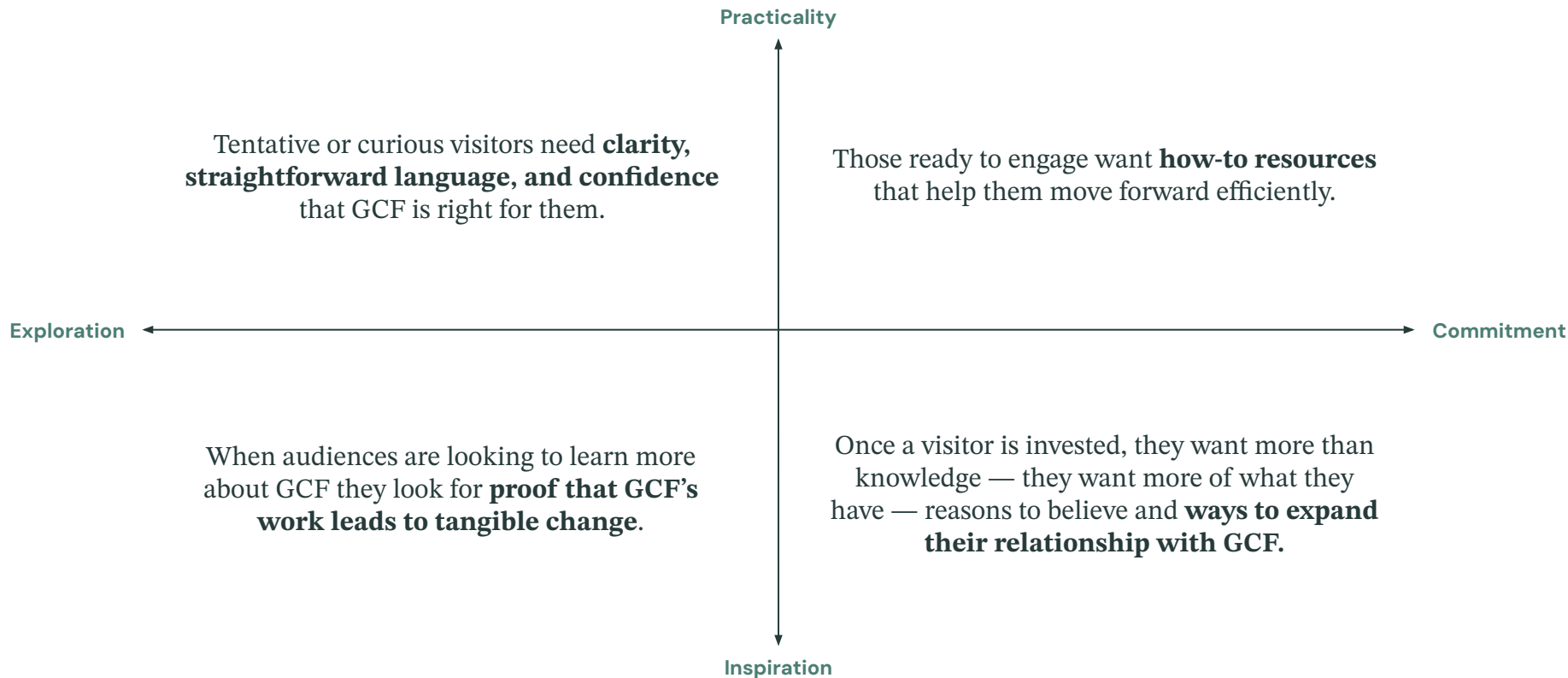
Balancing stability & innovation

People value GCF’s long-standing presence and roots in the community, but they also appreciate signs of forward-thinking (e.g., new technology tools, data-driven solutions). Exhibiting both stability and agility builds confidence and inspires engagement.

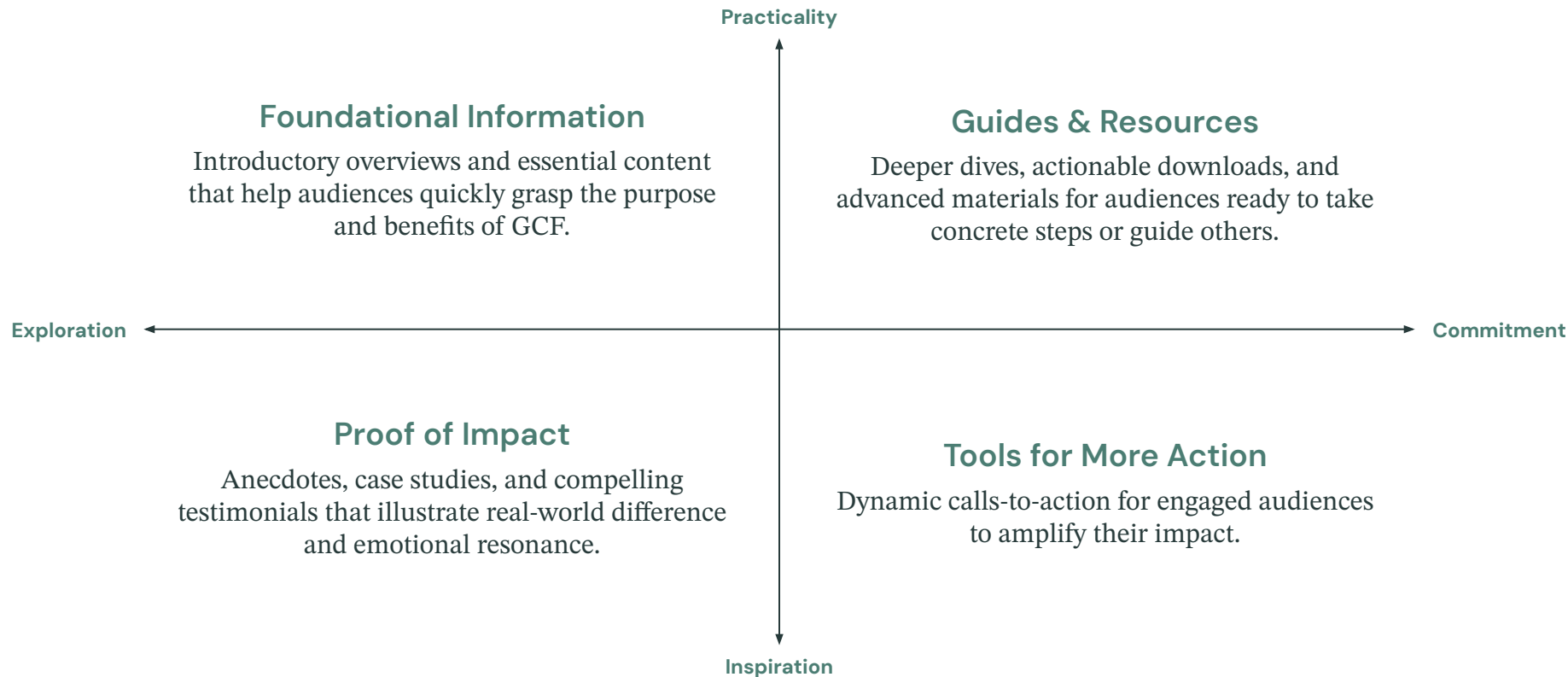
People crave clarity & transparency

Almost everyone wants easy-to-understand information about GCF. A confusing or jargon-heavy site undercuts trust for donors, nonprofits, professional advisors, and the general public alike.

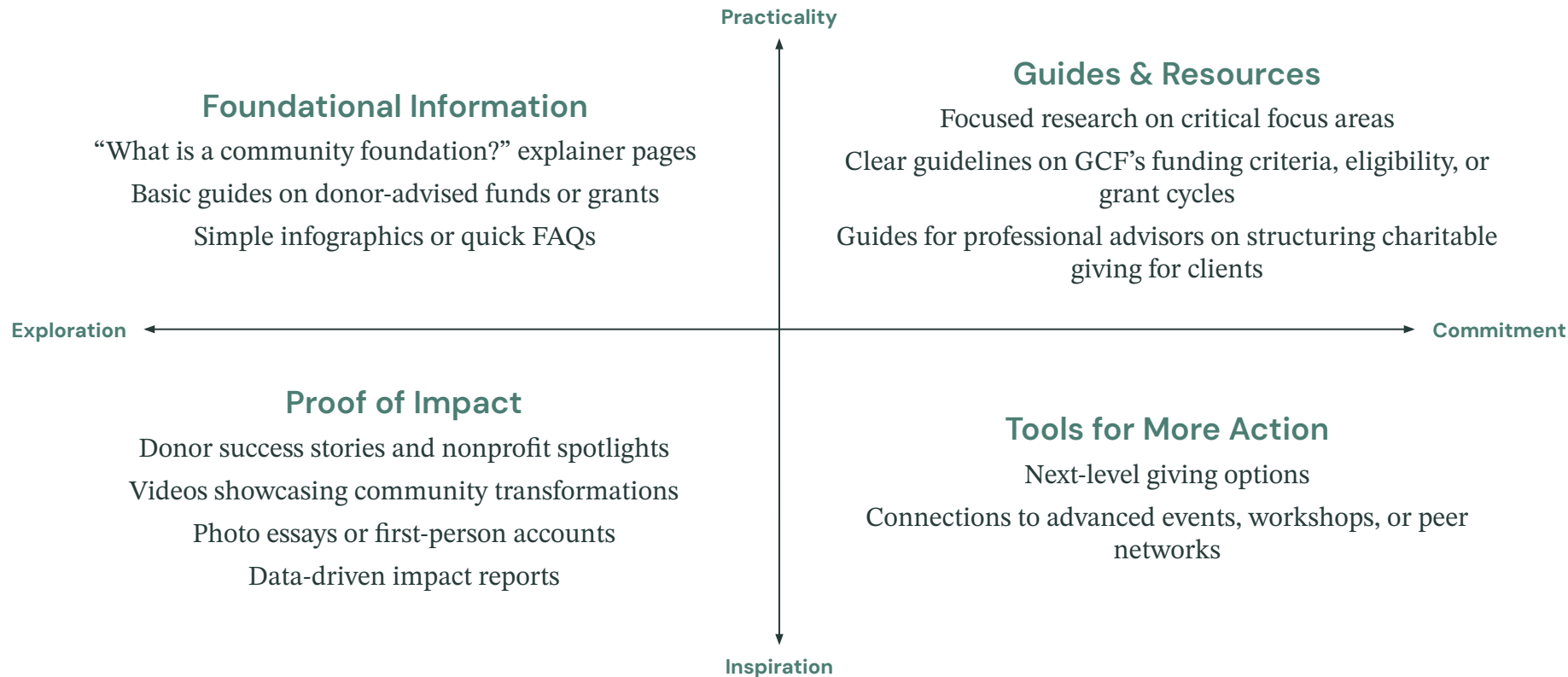
Audience Need States



Audience Need States – Content Categories



Content Ideas by Need State

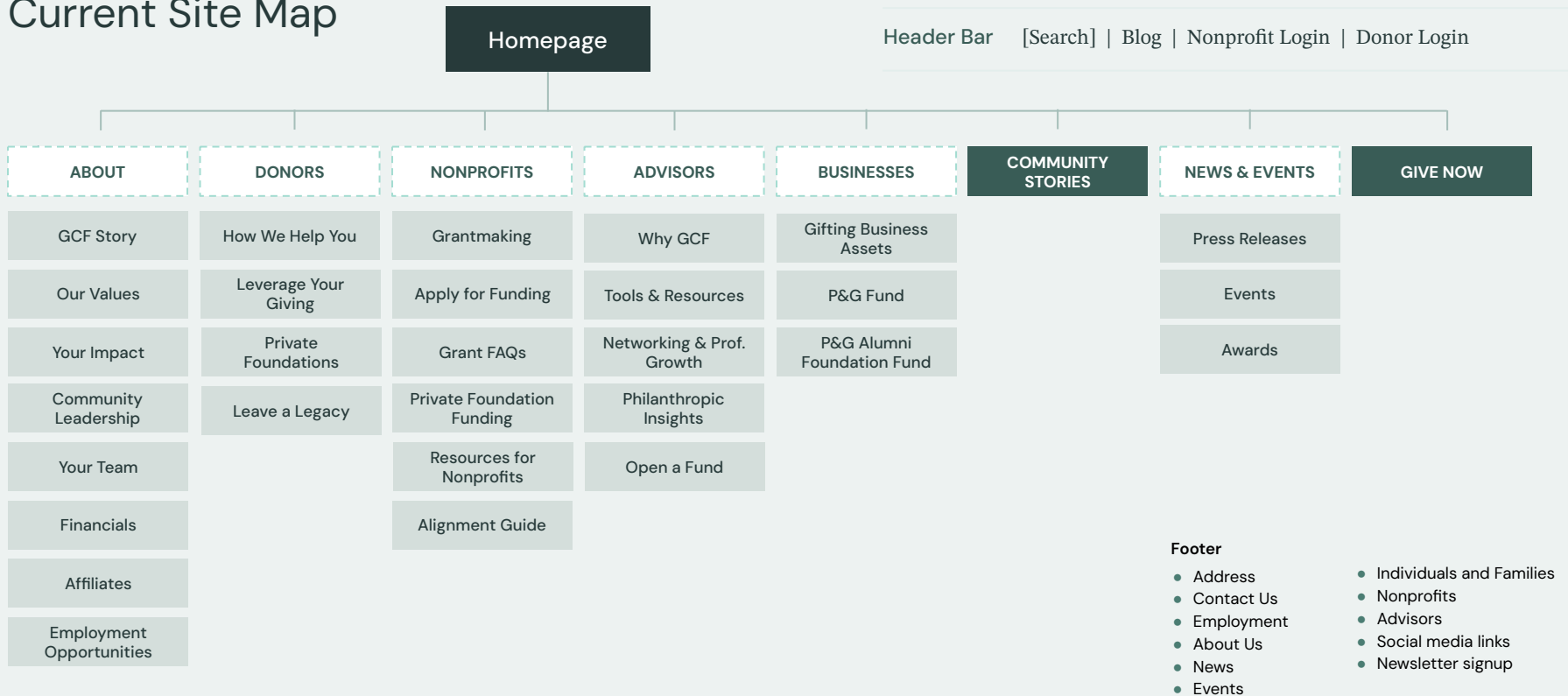




SECTION 3

Web Content Strategy

Current Site Map



Current Site Issues & Insights

Audience-Focused Structure w/o Landing Pages

Although the site is audience-driven, there aren't dedicated landing pages that clearly greet each group and guide them to relevant next steps. Visitors must figure out where to click among multiple subpages—resulting in potential confusion or disengagement.

Unclear Path for Businesses

The first options for businesses is “Gifting Business Assets,” which suggests a one-dimensional role for corporate partners, ignoring richer possibilities—like employee engagement programs, CSR strategies, or philanthropic leadership.

Philanthropy Jargon & Vague Labels

Headings like “Leverage Your Giving” or “Private Foundation Funding” may be unclear to newcomers, and “Resources” can be a catch-all that doesn't clarify the value of content within.

No Clear Elementary Explanations

For first-time visitors (whether donors, nonprofits, or general public), it's not obvious how a community foundation differs from other charitable entities, and it doesn't make GCF's unique viewpoint or historical impact clear.

Current Site Issues & Insights

Limited Emphasis on Impact

Real stories, data, or outcomes that demonstrate GCF's community impact are somewhat buried in the navigation. This leaves prospective donors or partners guessing about the tangible difference their contributions make.

Insufficient Calls-to-Action for Next Steps

Even when users self-select an audience path, they don't always encounter clear CTAs guiding them to contact GCF, open a fund, or apply for funding. This can stall them in their tracks.

"Resources" and "FAQ" Sections

Lumping downloads, toolkits, FAQs, and how-to guides in a single "Resources" bucket can overwhelm users. They might not know which resources apply to them or how best to use them.

Fragmented or Overlapping Sections

Without a cohesive narrative that ties each section together (e.g., the "About" vs. "Donors" vs. "Community Stories"), visitors might miss key content or jump from page to page searching for answers.

Key Content Strategy Concepts

Round 1 of website strategy is mostly focused on making sure things are where they should be. Seeing the site sections as siloes can be misleading.

The concept of the new strategy is to guide people through self-guided (yet strongly influenced) pathways using some key strategies.

Lots of cross-linking

Whether someone starts at “Donors” or stumbles onto a case study in the blog section, they should be able to get back and forth. We want to **create a link ecosystem** (which is good for SEO) that makes it easy to follow curiosity across multiple sections.

Established (but flexible) taxonomies

Clear, intuitive categories and tags help visitors discover exactly what they’re looking for, without feeling overwhelmed. At the same time, these taxonomies can adapt. With a well-structured framework in place, we stay organized on the back end while visitors enjoy a straightforward, meaningful journey.

Proof points sprinkled throughout

From impact metrics to real-life stories, we’re going to **make it easy to showcase evidence of impact** in every corner of the site. The goal is to spark user confidence and inspire action.

Key Content Strategy Concepts

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Scannability and information hierarchies

Instead of walls of text, **each page is designed to be easy-to-skim** through headings, short paragraphs, and clear visuals. Bold subheadings, organized lists and grid content, and strong CTAs guide the eye, ensuring that visitors can absorb the essentials quickly. This structure also helps them decide where to dive deeper when they're ready for more detailed content.

More effective calls to action

Part of that scannability and approach to hierarchy is that **every page now has select, purposeful CTAs**. We're going to tailor these calls to what people want next in their journey, rather than bombarding them with random options.

A NEW STRATEGIC APPROACH

Levels of Engagement

Your audience needs and business goals call for building a user-centered site that meets visitors where they are — the uninitiated and experienced alike should find themselves reflected with clear pathways.

The Levels

We funnel visitors toward meaningful action with confidence. They can jump forward and back depending on how ready and knowledgeable they are.

LEVEL 1

Awareness

Highlight the “why” and “how” behind community philanthropy and GCF’s role.

Provide simple explanations—“What is a community foundation?” or “Why open a donor-advised fund?”—so newcomers quickly grasp the basics and see immediate ways to connect.

LEVEL 2

Engagement

Offer deeper, actionable details for users ready to explore specific options — whether that’s opening a fund, applying for a grant, or learning how GCF partners with local businesses.

Here, they move from general interest to taking active steps.

LEVEL 3

Proof Points/Evidence

Present real outcomes that validate every step, showcasing GCF’s tangible impact on individuals and nonprofits.

Through case studies, data dashboards, and donor or nonprofit testimonials, audiences see the difference GCF makes — reinforcing trust and inspiring further involvement.

New Site Map

Utility Nav

[Search] | Contact | Nonprofit Login | Donor Login

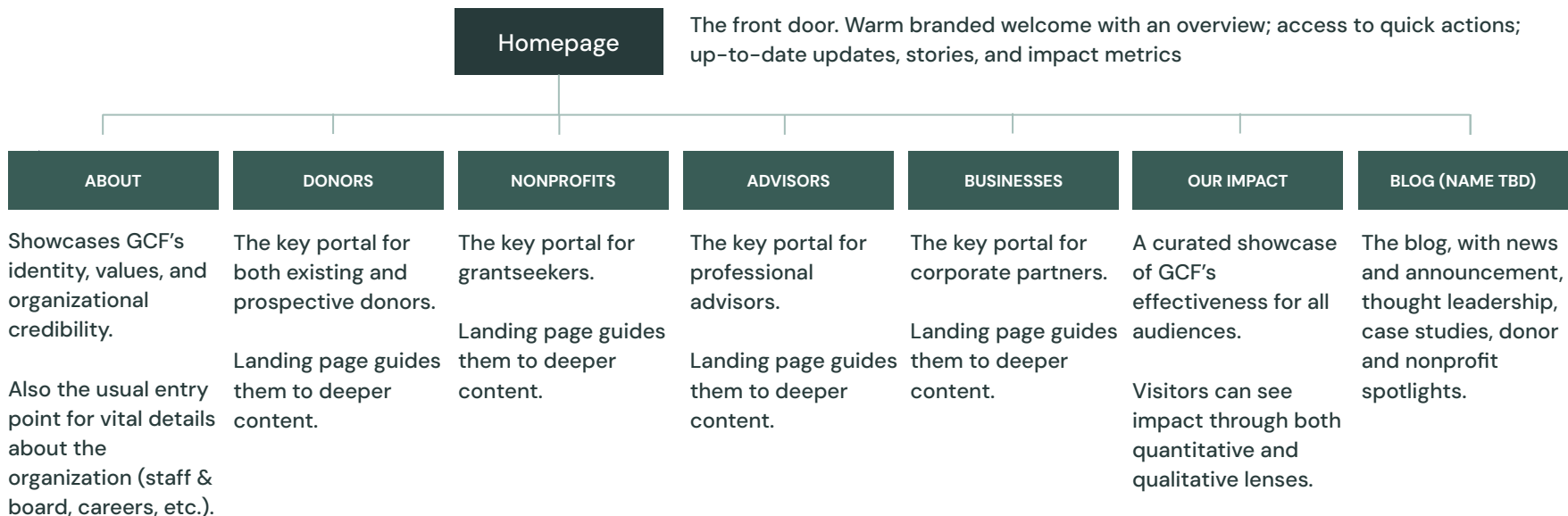
Footer

Address and Phone | Links for Audiences | Stay in Touch
Links (social, newsletter, contact) | Privacy Policy | Site Map

Homepage



New Site Map



Homepage

Draft Content Outline

The homepage of your website is the front door for most visitors. It is your opportunity to tell the most complete story of the organization.

Header & Main Nav

Hero

A strong opening statement that captures GCF's mission, along with an engaging image or video.

Overview

A concise summary (1–2 sentences) explaining GCF's role as a community foundation.
Link to About Us: "Discover how we're shaping Greater Cincinnati" that leads to the full "About" section.

CTA: What We Do →

The Newest

Staying up to date with what's the newest thing at GCF.

CTA: Visit Blog →

Audience Portals

Four brief "cards" or blocks, each with a short sentence or bullet on what that audience can find, plus a CTA.

CTA: Multiple →

Highlight of Impact & Focus Areas

Data points (e.g., total grants awarded, number of nonprofits supported) and human impact

CTA: Our Impact →

Footer Nav

About

Section Summary

This section introduces the Greater Cincinnati Foundation's identity, guiding values, and organizational structure. It answers the core questions of "Who is GCF?" and "How do we operate?" — giving visitors a clear sense of mission, leadership, and transparency. It also provides key resources for anyone seeking to learn more or connect with GCF on a professional or media-related level.

About Section
Page

What We Do

Leadership &
Board

Financials &
Accountability

Careers

News

Contact Us

This landing page provides an overview of GCF and a way into subpages in this section, along with off-ramps to other key pages in the site.

Offers a broad overview of GCF's mission, vision, and approach to serving Greater Cincinnati. Highlights what a community foundation is, why it matters, and how GCF differs from other philanthropic entities.

Profiles the individuals steering GCF—board members, executive team, and other leadership. Headshots, bios, board governance, etc.

Demonstrates GCF's commitment to transparency and responsible stewardship of donor contributions: Annual reports, 990 forms, and audited financial statements.

Open positions and a sense of the culture for those looking for employment opportunities

Placeholder page for Press Releases

Centralizes all contact options, making it easy for visitors to reach the right person or department.

Donors

Section Summary

This section is the central hub for individuals and families looking to start or grow their philanthropic journey with Greater Cincinnati Foundation. It offers step-by-step guidance on establishing a DAF, managing and maximizing it, and exploring more advanced giving strategies and support services.

Donors
Section Page

The main portal for both existing and prospective donors. This provides curated messaging and storytelling, focused primarily on prospects (with a special CTA for existing donors to visit GCon or go deeper).

Starting a
Fund

Provides an overview of how to open a donor-advised fund at GCF, including the benefits, timeline, and next steps for prospective donors.

Manage Your
Fund

Equips current donors with tools and insights to make the most of their existing funds and ensure their philanthropic goals are achieved. For prospects, this gives a clear sense of how easy it would be to work with GCF. Provides a place to inspire existing donors to explore other avenues for working with GCF.

Beyond the
DAF

Highlights additional or advanced giving options beyond a standard donor-advised fund, empowering donors to expand their philanthropic strategies.

Impact
Investing

A page for opportunities to invest in such vehicles as affordable housing REITs, etc.

Nonprofits

Section Summary

This area is dedicated to the regional nonprofits and community organizations that may receive funding, guidance, or collaboration from Greater Cincinnati Foundation.

It clarifies what funding opportunities are available, how to apply, and where nonprofits can find the resources they need to strengthen their work.



The main portal for nonprofits. This makes it very easy to quickly find the details they need right now (without calling) while also curating messaging for how nonprofits can engage with GCF.

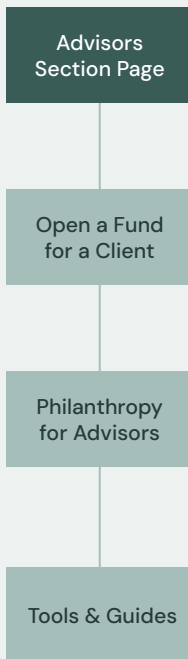
Introduce nonprofits to GCF's active or upcoming funding streams, including eligibility criteria and deadlines.

The nuts and bolts of grantseeking at GCF. Provide nonprofits with the tools and guidance they need to submit successful proposals and manage grants effectively.

Advisors

Section Summary

This section is dedicated to tax, legal, and wealth management professionals seeking philanthropic solutions for their clients. It highlights how Greater Cincinnati Foundation (GCF) can help advisors offer strategic giving options—like donor-advised funds or impact investments—while providing the necessary tools and best practices to streamline the process.



This page shows why GCF is a prime partner for advisors. Provides quick pathways to the most relevant next steps, proof points to build credibility, and anticipates and answers common questions (including what GCF does). Key CTA is to get in touch with someone at GCF.

A clear, step-by-step guide for advisors ready to establish a DAF on behalf of their clients. It emphasizes ease, efficiency, and the advantages of working with a community foundation.

An educational resource that positions GCF as a value-add partner for advisors seeking to elevate their philanthropic offerings. It covers philanthropic basics, advanced strategies, and how GCF can support clients' broader financial and charitable goals.

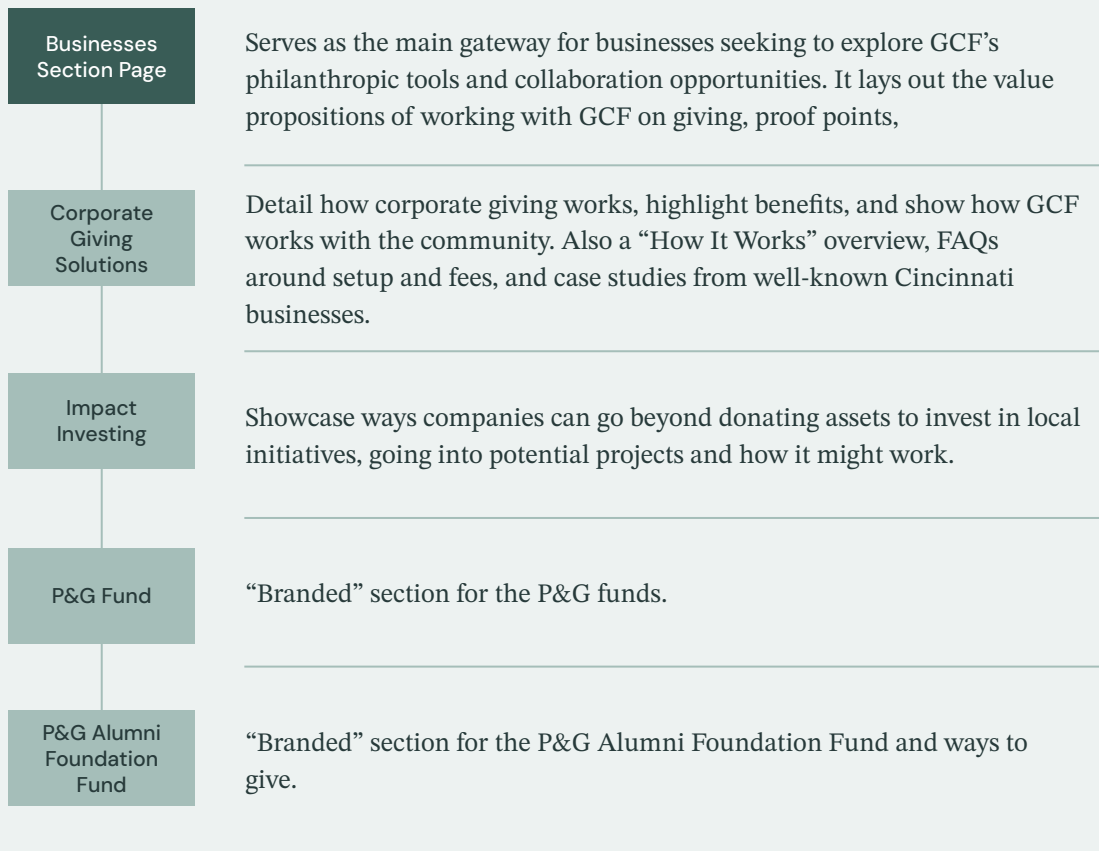
A library of downloadable resources, checklists, and research, helping advisors effectively integrate philanthropy into their practice. This page empowers them with knowledge to answer client questions confidently.

Businesses

Section Summary

A dedicated hub for companies of all sizes—local businesses, midsize companies, and large enterprises—seeking philanthropic solutions, community partnerships, and strategic CSR approaches.

This section positions GCF as a trusted ally that can help cocreate custom corporate giving solutions and amplify impact in Greater Cincinnati.

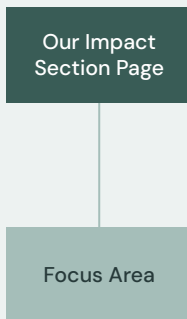


Our Impact

Section Summary

This section highlights the tangible outcomes of GCF's work in the Greater Cincinnati region, blending hard data (metrics, reports) with narratives (case studies, testimonials).

It aims to build trust, inspire generosity, and affirm why partnering with GCF drives meaningful change.



Provides a high-level snapshot of GCF's major achievements and overall approach to measuring success, including top-line metrics, presented in a visually engaging format. How GCF defines and tracks impact (e.g., sustainable change, equity, collaboration). “Explore Our Focus Areas,” linking to deeper breakdowns. Can also include annual reports.

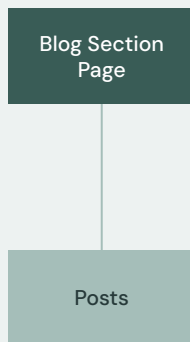
One page for each strategic priority (e.g., housing, education, workforce development, etc.), explaining specific goals and milestones. Each focus area features brief objectives, recent projects, any notable partnerships, data points, and related stories or posts.

Blog (Name TBD)

Section Summary

A lively “blog-like” space where Greater Cincinnati Foundation shares timely announcements, community success stories, and thought leadership pieces.

This section showcases GCF’s ongoing engagement, highlights the region’s achievements, and keeps audiences informed about new opportunities, events, and collaborations.



Provides access to ALL stories in one simple location. The main section page has a rotating hero spot for the latest or most significant stories. Below, a filter allows visitors to browse by article type (e.g., Donor Spotlights, Nonprofit Highlights, GCF News, Events) or date. The grid of article cards below updates.

Provide a flexible template for each story or update, with the ability to feature and embed videos, images, audio, pull quotes, related articles/content, and more.



SECTION 4

User Journeys

Overview

These user journeys are narratives that anticipate key pathways from primary audiences. They start as the visitor discovers the website, and follows through beyond the user's action/site conversion.

Through this format, we're looking to validate entry points, what information and proof points they might need to move them to action, and the type of action we want them to take.

Sometimes visitor will use the site to get the name and phone number of a contact. Sometimes they will feel satisfied to fill out a short form and have someone get back to them. We're looking to create and choose your own adventure experience for people that also meets the site goals.

User Journey 1

Prospective Donor (High-Net-Worth Individual Passionate About the Region)

Goals

Get a read on whether GCF is a good place to establish a donor-advised fund.

Understand both the tax benefits and the philanthropic impact.

Decide whether to open a fund with GCF or go to a commercial DAF provider.

Discovery



- Hears about GCF from a peer at a dinner party and has a discussion about their DAF.
- **Visits the GCF homepage** after a Google search (“cincinnati community foundation”).

Exploration



- **Goes right the Donors page and gets the key brand messaging about GCF as a worthy organization to help achieve their philanthropic goals**
- **Jumps down into “Starting a Fund.”**
- Reads about the distinction between national DAF providers and community foundations.
- Notices a success story about a family’s philanthropic legacy.

Deeper Engagement



- Goes to a **subpage to satisfy their curiosity about tax benefits** and explores how GCF aligns with a personal interests such as education.

Action



- **Clicks a CTA to talk further.**
- Is given option to call, email, or fill out a brief contact form to learn more about setting up a fund.
- Opts to fill out a form.

Follow-Up

- Receives an welcome email to schedule a meeting.

User Journey 2

Existing Donor with a DAF

Goals

Allocate funds from their donor-advised fund.

Check current fund balance and latest philanthropic news.

Discovery



- **Receives GCF's email newsletter** highlighting new investment opportunities with a suggestion to go to the “Managing Your Fund” page.
- **Goes to homepage to log in to GCon.**

Exploration



- Visits the “**Managing Your Fund**” page to review how to recommend a grant.
- Reads a brief overview on “Beyond the DAF” (impact investing, multigenerational philanthropy).

Deeper Engagement



- Heads to the “**Beyond the DAF**” **subpage** and reads about how a local nonprofit's mission (featured in the blog) aligns with the donor's giving goals.

Action



- **Goes to GCon** in another tab and recommends a grant to that nonprofit.
- **Sends an email** (or through a CTA) to express interest in finding other ways to work with GCF staff.

Follow-Up

- **Receives confirmation** of grant recommendation.
- **Gets an email back to schedule a call.**

User Journey 3

Nonprofit Grantseeker (First-Time Applicant)

Goals

Find out if their organization is eligible for a GCF grant.

Learn deadlines, application steps, and what materials are required.

Submit a compelling application.

Discovery



- Learns from a colleague that GCF might be offering new grants in their focus area (e.g., housing).
- **Googles “GCF Housing Grants Cincinnati.”**

Exploration



- Lands on the “**Nonprofits**” page
- Watches a brief video or reads a mini-case study about a successful housing grant recipient.

Deeper Engagement



- Skims eligibility bullets, follows a link to “**Grant Guidelines & How-Tos.**”
- **Goes through the wizard to see what grants are available.**

Action



- Clicks “**Apply Now**” to begin the online application form.
- Follows a step-by-step guide on the site with instructions for uploading documents.

Follow-Up

- Receives an email confirmation that the application was submitted.
- Waits for GCF’s review timeline updates, referencing the site’s “Important Dates” section for potential announcements.

User Journey 4

Nonprofit (Returning Grantee)

Goals

Check the next funding cycle to renew or expand existing support.

Access reporting requirements and share successes from the previous grant.

Discovery



- Gets a notification from GCF's mailing list about an upcoming grant cycle.
- **Clicks through to the “Grant Opportunities” page** for more details.

Exploration



- Looks for the reporting requirements link to ensure they are compliant before reapplying.
- Sees a mention of a new “Community Leadership Grant” that may fit their expanded programming.

Deeper Engagement



- Checks the “**Grant Guidelines & How-Tos**” to confirm any changes from the previous cycle.
- **Reads a blog post** featuring an org that scaled up after an initial GCF grant.

Action



- **Initiates a new or renewal application** for expanded funding.

Follow-Up

- Receives confirmation of report submission and reapplication steps.
- Schedules a call with a GCF program officer to discuss strategic growth.

User Journey 5

Advisor Exploring Philanthropic Options for a New Client

Goals

Learn how GCF can serve as a partner for client giving strategies.

Understand tax implications and fund structures (e.g., donor-advised funds).

Demonstrate added value to the client by offering local philanthropic expertise.

Discovery



- Advisor receives a new high-net-worth client who wants to give back to Cincinnati.
- **Searches “philanthropic partner in Cincinnati” or “community foundation donor-advised fund options.”**
- **Lands on GCF’s “Advisors” page.**

Exploration



- **Goes to “Open a Fund for a Client”** to see how easily a DAF can be established.
- Notices a case study on the site about an advisor who helped a client save on estate taxes through GCF.

Deeper Engagement



- **Visits “Philanthropy for Advisors”** for deeper insights: legal structures, IRS guidelines, and best practices.
- **Reads a short white paper from GCF’s “Tools & Guides” library**, clarifying tax benefits.

Action



- **Clicks “Schedule a Consultation with GCF Staff”** to discuss the client’s specific needs.
- Fills out a form requesting a follow-up call or a meeting.

Follow-Up

- Receives an email from GCF with next steps and a PDF overview of DAF setup.
- Advisor shares GCF’s materials with the client, preparing to finalize a recommended philanthropic plan.

User Journey 6

Experienced Advisor Seeking Advanced Solutions

Goals

Discover specialized giving vehicles for clients with complex assets (e.g., real estate, privately held shares).

Explore impact investing or other advanced philanthropic vehicles to differentiate the advisor's services.

Strengthen the advisor's reputation as a strategic partner for affluent clients.

Discovery



- Advisor already knows GCF from prior smaller deals but wants to see if GCF can handle more complex asset donations.
- Sees a GCF newsletter mentioning “Impact Investing Solutions for Advisors.”

Exploration



- **Clicks through to the “Advisors” page**, scanning success stories about complex asset gifts.
- Reads about “Impact Investing,” noting potential ROI and local impact.

Deeper Engagement



- **Downloads a detailed guide on how to donate complex assets** or how GCF structures impact investing opportunities.
- **Watches or reads a testimonial from a fellow advisor** whose client donated significant real estate via GCF.

Action



- **Contacts a GCF Philanthropic Officer.**

Follow-Up

- GCF staff confirms feasibility, outlines the process and any needed documentation.
- Advisor and GCF collaborate on a custom philanthropic plan that both meets client goals and showcases advanced advisory capabilities.

User Journey 7

Local Business (Mid-Sized Company Seeking Corporate Giving Solutions)

Goals

Establish a corporate donor-advised fund or philanthropic vehicle.

Engage employees in community initiatives to improve brand reputation and morale.

Understand tax benefits and potential ROI for corporate philanthropy.

Discovery



- CEO attends a local chamber event where GCF presents on “Corporate Social Responsibility in Cincinnati.”
- **Visits the GCF site, clicks on “Businesses.”**

Exploration



- **Reads about “Corporate Giving Solutions,”** sees mention of employee engagement tools.
- Notices a success story from another mid-sized company that partnered with GCF.

Deeper Engagement



- **Skims “Impact Investing”** and wonders if it aligns with the company’s strategic plan.

Action



- **Clicks “Schedule a Consultation”** to explore next steps.
- Fills out a short form describing the company’s philanthropic goals.

Follow-Up

- Receives an call or email to talk about potential philanthropic structures (matching gift programs, corporate DAF, etc.).
- Sets a meeting with GCF staff to finalize the approach and timeline.



SECTION 5

Tech Assessment

Activities Summary

In addition to our discovery sessions with your team, we performed a technical audit of the gcf.org site, looking at the tech stack, content types, plugins, and general functionality.

We also ran an SEO audit on the site, as discussed in [Section 6](#) below.

This section outlines our findings and the beginnings of our recommendations for the new GCF website, which we will refine in the next round of strategy.

CMS Assessment

The current GCF website is built on the WordPress CMS. GCF has expressed interest in remaining on this platform, which we fully support, as it enables us to migrate over assets (file uploads) and some existing content. It will also help ease the onboarding process for the new site, as content authors will have a contextual understanding of where things live in the system.

What We Heard

GCF seeks to improve its online presence and overall UX on the **WordPress CMS** via the following priorities:

- Security is a priority; will need a CDN (*Cloudflare*)
- Meet minimum A/AA accessibility standards
- Impeccable responsive design for mobile experiences
- SEO best practices and strategy are important
- Assess forms: implement better UX; manage for bots (*reCAPTCHA not working well*); assess code that gets called on form submits
- Remove functionality supporting internal operations from the website
- Content tagging and filtering
- Better storytelling opportunities through expanded content types and features, such as data viz
- Gated content to capture visitor information
- Integrated video support (*YouTube and Vimeo*)
- Announcement bars / popup notifications
- Manage for posts with and without images
- “Hidden” pages that are not indexed/linked for internal and specific audience use
- Exclude PDFs from site search results
- CRM integration
- Privacy considerations for visitors (*privacy/cookie notice*) and staff (*email addresses*)
- Include feedback opportunities for visitors on site
- Events will not need to be managed as structured content on the new site (*can be freeform content*)
- Need best practices for creating, storing, managing media library
- Affiliates–Women’s Fund and All In Cincinnati–will become sites with own subdomains (*GCF to handle*)

Plugins

The GCF site has 38 active and 20 inactive plugins installed. This is an excessive number of plugins that can compromise your site. We have done a first-pass to assess whether to keep, consider, or remove the plugins.

KEEP/LIKELY KEEP

We deemed the following plugins either essential or useful. In most

- Advanced Custom Fields Pro
- ACF Pro
- Branda Pro
- Duo Two-factor Authentication
- Enable Media Replace
- Filebird Pro
- GP Nested Forms
- Gravity Forms
- Import/Export Add-on Feeds for Gravity Forms
- Post Types Order
- Redirection
- Yoast SEO

CONSIDER

We do not have sufficient information on some of these plugins.

- ACF: GF Active Forms
- Category Order and Taxonomy Terms Order
- Gravity Forms All Fields Template
- Gravity Forms Paypal Payments Pro Add-on
- Gravity Forms Salesforce Pro
- Gravity Forms Stripe Add-on
- Gravity Forms Submit to Access
- WP Cronrol

REMOVE

These plugins are nonessential and some are better served via custom code, better plugin options, or by simply removing them.

- Advanced Editor Tools
- Akismet
- All in One Login
- Better Search Replace
- Blogger Importer
- Bulk Actions Pro for GF
- Cache Enabler
- Contact Form 7
- Custom FB Feed Pro - Carousel + Personal
- DB Manager WP Adminer
- Disable Gutenberg
- Easy Social Feed
- Easy Updates Manager
- Email Log
- Filebird Lite
- GCF Beaver Builder Additional Modules
- GF Braintree payments
- GF reCAPTCHA Add-On
- Gravity PDF
- Gravity Perks
- Hello Dolly
- Highlight Search Terms
- Hotjar
- Jetpack
- Multiple Columns for GF
- Plaid Grantee Data Conf.
- Post Views Counter
- Smash Balloon Custom FB
- Sparkpost
- UpdraftPlus
- WordPress Importer
- WP Mail Logging
- WP Visual Sitemap
- WPMU DEV Dashboard
- Yoast Duplicate Post

Additional Technical Specifications

We'll want to confirm hosting, integrations, and other support items prior to the start of development.

Domains

You have 13 domains registered on GoDaddy that currently forward to the homepage and a couple of other pages on the site.

Hosting

Your current WordPress site is hosted on devPhase and managed by Matt Healy.

CDN

We strongly recommend using a Content Delivery Network, such as Cloudflare, to help ensure site reliability, performance, and security. We will want to learn more about your setup and configuration to plan for launch.

Integrations

The new website will include common integrations such as Google Tag Manager and Google Analytics.

Accessibility

We will build your site with a basic level of accessibility, such as designs that meet [WCAG 2.2](#) contrast and font size guidelines and code that passes A and some AA accessibility checkers.

Registered Domains

You have 13 domains registered on GoDaddy, 12 of which forward to various pages on the primary domain.

GCF may no longer have use for all of these domains and will consider letting some of these registrations expire.

We will consider the forwards for domains that you decide to keep as part of the content development and launch plan.

gcfdn.org	Primary domain
gcfconnections.com	→ Homepage
gcfconnections.org	→ Homepage
gcfdn.com	→ Homepage
gcfdn.net	→ Homepage
gcfstrategicconnections.com	→ Press Releases
gcfstrategicconnections.org	→ Homepage
greatercincinnati.org	→ Homepage
nkycommunityfoundation.com	→ Northern Kentucky Fund page
nkycommunityfoundation.org	→ Northern Kentucky Fund page
northernkentuckycommunityfoundation.com	→ Homepage
northernkentuckyfund.com	→ Northern Kentucky Fund page
transformcincinnati.org	→ Homepage

Development & Launch Considerations

It may seem early in the project, but now is the time to start thinking about what it will take to develop and launch the site. We need to gather a little more information from your team to finalize recommendations, and **will set up another technical discovery meeting in the coming weeks.**

Maintenance Considerations

How we set your site up for hosting and deployments depends on your priorities and expectations following launch. A bit of info will help us determine which platform is the right provider for GCF.

- We understand Matt Healy will manage the technical aspects of the site following launch. We will plan to work with GCF and Matt to understand his capacity and how he works and how that aligns with GCF's priorities.
- We will weigh security and performance considerations against ease of updates (*e.g., requiring developer support to update the core packages and plugins and add new plugins vs. using the CMS admin to make point-and-click updates*).

Cloudflare

To ensure the site is reliable, performant, and secure, we'll want to review the **DNS** for all your domains and services. This requires **another technical discovery session** in the coming weeks, after which we can make recommendations for how to move forward for the new site. Note that the [Cloudflare business-level services are free for nonprofits](#).

AI and Security/Performance Considerations

AI bots scraping data on the GCF site may impact performance. There is a trade-off between blocking all AI bots to ensure site integrity and content ownership and not being indexed by AI engines that return your site for user queries. You might consider monitoring site usage to see if/how it impacts your licenses and user experiences.

Development & Launch Considerations, Cont.

We recommend setting up a build pipeline for deploying changes to the new site and building the theme. We'll help you decide upon and set up the following accounts.

GitLab or GitHub

You are currently storing your site's code in a **GitLab** repository, which ensures version control and update history, and when implemented using best practices, requires an approval process and runs a build that deploys to a staging site for testing and to the production (live) site upon approval. GitLab is a bit more expensive than GitHub (\$29/user/month vs \$4/user/month). We need to add 4–5 S&C developers during the development phase plus anyone from your team who needs access. Following launch we can likely reduce the number of S&C users on the account to save on operation costs. We'll need to know which repository you plan to use to store your codebase.

Chromatic

We use this during development for testing the components. During the peak of development it may cost up to \$150/month (*possibly more for a short period*). Once we wrap testing, we can dial back to the free version, which we'll continue to use for visual regression tests anytime we have an update to any of the components.

ACF Pro

We will need a license to this WP plugin to fully customize your site. It's likely the Personal license at \$49/year is sufficient. *Note that you have a license for your current site, and we will likely need another one through development until we decommission the current site.*

Expected License Fees Summary

This summarizes all new expected and possible costs mentioned in the previous slides. Licenses for plugins carried forward from the existing GCF site are not listed here, such as Gravity Forms add-ons and Filebird Pro.

** Monthly per-seat charges for GitHub and other accounts may depend on the number of GCF seats. Consider using a common login for non-developers.*

ACF Pro Personal Plan

\$49/year

Chromatic

\$150/month during development (3–4 months)
Free post-launch

GitLab or GitHub

\$24+ to \$174/month during development for up to 5 S&C devs and at least 1 GCF account (\$29/user/month for GitLab and \$4/user/month for GitHub)

\$16+ to \$116/month post-launch for up to 3 S&C devs and at least 1 GCF account

Cloudflare

Free business-level services as a nonprofit

Hosting

To be determined.

Web Fonts

To be determined based on approved visual direction.

Content Types & Taxonomies

In the next round of strategy we will begin establishing the content and feature requirements for the website. We'll use this information to determine the data fields and UX of the CMS, any reusable content in the backend (*create once/render everywhere*), and any relational records to consider.

Content Types

A content type is a **set of data fields** that represent a specific kind of structured content within a website.

For example, a **Team Member content type** might have a name, job title, phone number, and photo. We can create Team Members in the CMS and then render them on a Team landing page. If it's important to be able to filter by team member type then we can add a **taxonomy** to the Team Member content type. We can then either include a filter bar on the team landing page, or separate the types throughout the page in blocks.

We can also create a **Team Block** that can be added to any page of the site to automatically pull in Team Members by type.

Taxonomy

A taxonomy is a **group of related terms** applied to content types. It's like a labeling system on the website for filtering information. Content types may have one or more taxonomies applied, depending on your website's needs.

Taxonomies are managed as content in the CMS. While there is no hard limit on the number of terms you can create, we recommend thinking about your audience's needs and experiences, and keeping it concise and organized, as possible.

Current Content Types & Taxonomies

You currently have several custom Content Types on your site, each with their own taxonomy. In the next round of strategy, we will work with you to determine the following:

- Which News and Blog posts to import into the new site (all, some).
- Any new content types that will help you manage content easily and tell a better story (e.g., Resources).
- Taxonomies for content types that enable filtering and curated views of content.

News Post Content Type

- There are 140 News posts, dating back to 2020.
 - There is an existing **News Category** taxonomy (1 term: “press-releases”)
-

Blog Post Content Type

- There are 342 Blog posts, dating back to 2015
 - There is an existing **Category** taxonomy (13 terms)
-

Team Member Content Type

- There are 51 Team Members
- There is an existing **Category** taxonomy (11 terms)
- *In the new site, Team Member types may be split into separate content types or organized by taxonomy for Governing Board, Staff, and Committee & Task Forces*

Components

In our discovery sessions, we identified 23 components on your current site that help support your storytelling needs. We will assess with you the priority and usefulness of these components in the next round of strategy.

Announcement Bar (<i>sitewide</i>)	List Block
Articles Grid	Info Block / CTAs List
CTA Blocks (<i>multiple variants</i>)	Multi-Link CTA / Callout/ Tutorial
CTA Grid	Multicolumn Content
Community Stories Block	Multi-step Forms (<i>Gravity Forms</i>)
Contact Block	Popup (<i>individual pages</i>)
Deadlines and Decisions Table	Related Articles Block
Embedded Content	Slider Block (<i>cards, logos</i>)
Events Grid / List	Stats Block / Data Visualization
Footnotes Block	Testimonial Blocks (<i>multiple variants</i>)
Gated Content Form	Video Block
Grid Block (<i>images, icons</i>)	

Site Search

WordPress comes with its own, built-in search functionality. It's efficient, reliable, and useful. And while your current site uses it, current functionality could be improved. Some organizations prefer a more robust search, with advanced search options and better rendering capabilities. These come with tradeoffs, including increased scope and an expanding database problem for large websites.

We need a little more information from you about your preferred search strategy to make a final recommendation on this.

Additionally, your current site has indexed several pages in the [sitemap](#) that are empty, contain draft content, or should not be indexed at all (e.g., thank you pages).

We recommend that you audit your sitemap periodically for content that should not be consumed by search engines and other tools.

Privacy Policy & Cookie Notice

Informing site visitors of how you collect and use their data and whether your site stores cookies on their computer is important, especially as many states have moved to protect users' rights to privacy.

Action Item: *You will need to consult with your legal team to determine what kind of cookie notice to render:*

- **Opt out:** *manually opt out of data collection; scripts will run until then; compliant with CA laws.*
- **Accept to use:** *click a button to acknowledge GCF's collection of data and accept terms of use.*
- **Opt in:** *manually opt into data collection; scripts will **not** run until then (incl. GA); GDPR compliant.*

Privacy Policy

During development, we will provide documentation for GCF's legal team as to where we're collecting [PII](#) data on the website (e.g., form submissions) and if there are any cookies to document in the privacy policy. We'll also work with your team to determine what level of cookie notice to apply: accept to use, opt out of data collection, or opt in to data collection.

Cookie Notice

A cookie is a small piece of data, stored on a user's computer by their web browser. Cookies are usually stored to improve the user experience. For example, we use a cookie to tell the browser not to open the Cookie Notice on a given browser after a site visitor closes it.

Cookies may be created for Google Analytics, WP, other plugins on the site, and even some custom components.

Analytics + Search Data

You will want to collect data about your site engagement and activities as soon as your new site launches. These are the tools we'll use to help you make decisions about the effectiveness of content, information architecture, user pathways, and other constructs on your new website.

Google Analytics

You have one GA4 property that is currently collecting data. We will use this property on the new site so you don't lose any historic data.

Google Tag Manager

We will add the existing [GTM container](#) to your new site, which places the GA4 tag on the page. This will ensure you collect data at launch.

Google Search Console

This tool helps you understand the searchability of your site and helps you monitor, maintain, and troubleshoot your site's presence in Google Search results and, thereby, other search engines.

New ERP System

GCF is finalizing a decision this month on an ERP system to implement for the organization. The setup and configuration of this system will not take place for another 12 months. The new GCF website will launch well before the ERP system is put into place.

Therefore, we will build the new website to work with their current Salesforce ERP. We will, however, work with with GCF to determine if/how the new ERP needs to integrate with the new website (e.g., analytics data). We will rely on GCF to inform us of any needs or requirements when they are known.



SECTION 5

SEO Analysis & Strategy

SEO Analysis & Strategy

As part of our full Web Strategy offering, we include a full SEO Analysis report and Strategy in a separate document. Quick links are provided below.

[SEO Analysis & Strategy R1](#)→

SEO Overview

Below is an overview of our analysis and where we recommend change:

Metadata Optimization

Improve page titles and add meta descriptions to enhance search rankings and click-through rates.

Domain & Security

Extend domain registration, update DNS settings, and make domain info public for local SEO.

Content & Structure

Reduce duplicate content, and use structured metadata for better indexing.

Technical SEO Fixes

Optimize robots.txt, fix heading structure, and ensure all images have proper alt text.

URL & Navigation

Simplify long URLs, use clear descriptive paths, and improve site navigation for better usability.

Local SEO Enhancements

Add structured address data and LocalBusiness schema to boost visibility in regional searches.

Current



Greater Cincinnati Foundation

<https://www.gcfnd.org> > rfp



Requests for Proposal

werisetgether@gcfnd.org. Boots on the Ground. Funding Focus and Request for Proposal. Funding Focus: The Boots on the Ground Fund seeks to provide support to ...

Better



Greater Cincinnati Foundation

<https://www.gcfnd.org> > rfp



Cincinnati Grants for Nonprofits: Requests for Proposals

Greater Cincinnati Foundation (GCF) is the leading investor in nonprofits, providing grants to businesses and organizations that will further the growth, development and prosperity of our city.

What's Next

Coming in R2

We will address your feedback to R1, and add:

Content Outlines & User Pathways

More detailed description of each page of the site with refined user pathways.

Design

We will mood boards that begin the design direction process.

Technical & Functional Recommendations

Specific recommendations for new or modified features to accommodate new content and storytelling requirements.

Feedback Guidelines

Get back to us by **Wednesday, March 12** with comprehensive, consolidated feedback.

Please use [this feedback form](#) to approve/revise:

- Strategic Foundations →
- Audience Articulation →
- Web Content Strategy →
- User Journeys →
- Tech Assessment →

Thank you!

For any additional questions, please contact:



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