

REGIONAL FOUNDATION

Regional Foundation Strategic Plan

Executive Summary

The Regional Foundation’s strategic plan represents a pivotal moment of alignment, reflection, and forward momentum. Rooted in a deep commitment to racial, social, and economic justice, this plan clarifies the Foundation’s role as a values-driven, community-centered funder working to advance equitable, thriving neighborhoods across the region.

This plan affirms a clear direction: to shift from traditional philanthropic approaches toward practices that more intentionally center community power, trust, and long-term systems change. Through its mission, vision, and values, the Foundation positions itself not only as a grantmaker, but as a partner, convener, and catalyst—working alongside communities most impacted by inequities to co-create solutions and drive lasting impact.



The strategic priorities outlined in this plan—Equity, Justice and Impact; Community Power, Equitable Funding and Place; Partnerships, Advocacy and Systems Influence; and Capacity, Sustainability and Stewardship—reflect a comprehensive approach to aligning internal practices with external impact. Together, they emphasize the importance of trust-based philanthropy, resident-led decision-making, and coordinated action across sectors.

This plan is both aspirational and actionable. It establishes a clear framework for decision-making, accountability, and learning, while remaining adaptive to changing conditions and emerging opportunities. Ultimately, it reflects the Foundation’s commitment to moving beyond intention toward sustained, measurable change in the communities it serves.

Methodology & Strategic Planning Process

The development of this strategic plan was guided by an inclusive, iterative, and equity-centered process designed to reflect the perspectives, experiences, and aspirations of those closest to the Foundation’s work.

I. Discovery & Engagement

Stakeholder Input

The process began with broad stakeholder engagement to understand the Foundation's current landscape, strengths, and opportunities. This included surveys, one-on-one discussions, and facilitated focus groups with board members, staff, grantees, and community partners. These methods captured both quantitative and qualitative insights, creating space for stakeholders to reflect on the Foundation's role, relationships, and alignment with its values. This phase surfaced key themes around trust, community voice, and opportunities to better align intention with implementation.

Organizational Document Review

A comprehensive document review was conducted to assess how equity, diversity, and inclusion are reflected across the Foundation's policies, practices, and structures. This review took a holistic approach, examining operations, governance, and external relationships, with recommendations spanning staff practices, organizational systems, and board leadership.

While race and ethnicity were a central lens, the review also applied an intersectional perspective, considering factors such as gender identity, sexual orientation, disability, age, caregiving status, faith, and geographic disparities.



Documents were analyzed using a matrix format to capture key observations and cross-cutting themes, and grouped into three areas:

- Personnel and Human Resources
- Decision-Making, Input, and Communications
- Background, Leadership, and Structure

This effort generated actionable insights to strengthen alignment between the Foundation's values and practices.

2. Assessment & Synthesis

Insights from stakeholder engagement and document review were analyzed alongside:

- A landscape scan of regional needs and philanthropic trends
- Internal assessments of operations, governance, and grantmaking practices
- Identification of key tensions (e.g., risk vs. visibility, equity vs. traditional constraints)

This phase focused on identifying patterns, clarifying strategic opportunities, and grounding recommendations in both data and lived experience.

3. Co-Creation & Alignment

Through a series of facilitated workshops with board and staff, the Foundation:

- Refined its mission, vision, and values
- Identified strategic priorities and goals
- Explored shifts in practice, including trust-based funding, participatory approaches, and advocacy

This phase emphasized shared understanding, alignment, and ownership, ensuring the plan reflects both organizational commitment and collective vision.

4. Refinement & Validation

Draft materials were iteratively refined through feedback from leadership and stakeholders.

This included:

- Testing clarity and resonance of language
- Aligning priorities with organizational capacity and resources
- Strengthening connections between values and implementation

The result is a strategic plan that is both grounded in stakeholder input and positioned for effective, real-world application.

Mission Statement

We mobilize resources to advance racial, social, and economic justice through resident-led community development that builds equitable, thriving neighborhoods across our region.

Vision Statement

We envision a region where communities most impacted by inequities have the power, resources, and leadership to shape their futures within just and equitable systems.



Organizational Values

Community

We approach our work with love, joy, and humility: working in partnership with community-based organizations towards a vibrant, healthy region.

Justice

We actively work to dismantle systemic racism and other forms of oppression by embedding fairness, equity, and inclusion into all that we do. We acknowledge how these barriers shape social and economic issues, and we commit to removing them through our work in pursuit of a more liberated world.

Stewardship

We recognize the oppressive origins of our history and use our resources to repair harm and build community wealth. We steward these resources with accountability, long-term vision, and care for our relationships.



Collaboration

We co-create solutions through shared power, authentic engagement, and continuous learning. We listen, celebrate all contributions, and hold ourselves to be reliable and responsive.

Trust

We build trust through transparency, follow-through, accountability, and clear communication — doing what we say and learning openly from our impact.

Strategic Priorities, Goals & Objectives

Strategic Priority I: Equity, Justice, and Impact

Equity and racial, social, and economic justice guide our decisions, investments, partnerships, governance, and practices.

Goal I.1

Advance justice through governance, investments, and partnerships that build accountability to communities most impacted by inequities.

Goal 1.2

Use measurable outcomes and lived experiences to operate as a learning organization that reflects on both intended and unintended consequences.

Strategic Priority 2: Community Power, Equitable Funding and Place

Align resources, decision-making and geographic strategy to address racial, social, and economic inequities while strengthening community power.

Goal 2.1

Support trust-based, flexible investment approaches that respond to community-defined priorities, evolving conditions, and moments of urgency.

Goal 2.2

Embed community influence in decision-making through clear processes, defined roles, transparency, and accountability.

Strategic Priority 3: Partnerships, Advocacy and Systems Influence

Leverage our financial resources, relationships, and convening power to influence systems in alignment with community priorities

Goal 3.1

Promote shared learning, coordination, and regional alignment through learning networks, communities of practice, and strategic collaboration with public systems and peer funders.

Goal 3.2

Support community-led advocacy by funding partner efforts, convening learning spaces, amplifying community voices, and selectively using the Foundation's influence when aligned with mission and capacity.

Strategic Priority 4: Capacity, Sustainability, and Stewardship

Align governance, culture, operations, and financial stewardship to sustain long-term impact and community care.

Goal 4.1

Build equitable governance and operational structures to reflect communities served and sustain long-term operational effectiveness.

Goal 4.2

Strengthen the foundation as a learning organization committed to reflection and adaptation.

Goal 4.3

Create mission-aligned investment approaches within the endowment to respond to opportunities, urgency, and long-term goals.

Closing Reflection

This strategic plan marks a continued evolution in how the Regional Foundation defines its role, uses its resources, and shows up in partnership with communities.

It reflects a clear commitment: to move from intention to action, from fragmented efforts to coordinated impact, and from traditional power structures toward shared leadership with communities most impacted by inequities.



The path forward will require courage, discipline, and ongoing reflection. It will require the Foundation to continuously examine how its practices align with its values, to remain responsive to community priorities, and to embrace learning as an essential part of impact.

Most importantly, this plan affirms that meaningful change is not achieved alone. It is built through relationships, trust, and collective action.

By centering equity, investing in community power, and leveraging its role as a partner and convener, the Regional Foundation is positioned to help shape a future where all communities have the resources, voice, and opportunity to thrive.