GoPhilanthropic Foundation

Strategic Plan

2022-2027

Executive Summary

2022-2027
Letter From The Board Chair

As many of you know, I stepped out of an operational role at GoPhilanthropic Foundation (GoPhil) two years ago to focus on my family and create the space for GoPhilanthropic to grow and fully embrace the transition from Co-Founder led to team led. I missed so much about GoPhil – the wonderful people it attracts, the dedicated team, the donors with whom I had shared so much, the deeply committed board and my fellow Co-Founders. I also missed everything that GoPhil represents to me; a constant source of education, an opportunity to be pulled out of my comfort zone, a way to give back and a continual source of inspiration, as our partners tirelessly go about their incredible work, no matter what! In January 2022, I was delighted to rejoin GoPhil as the Board Chair.

We are a small organization, established as a not-for-profit public charity in 2011, and deeply rooted in our core values of listening, learning, trust-based philanthropy and amplifying the voices of our partner organizations. Our donor community is passionate and loves to learn, visit partner organizations and have a deep understanding of the programs they support in addition to the impact of their support. GoPhil is focused on bringing all this together in a holistic way. It’s a lot to communicate in a sentence or two, and this is something we have wrestled with for years!

As a mature organization, there are no major shifts in our strategic direction. GoPhil is settled in who she is and the essence behind all the work. This essence is captured in our ‘theory of change’ and explains our reason to be and all the pieces we need to bring together to achieve the change we want to see.

Our focus is more on refinement and improvement of our strengths and a re-engagement of our community in meaningful ways as we move beyond the uncertainty of the last two years.

Supporting this, the strategic plan looks at the philanthropic landscape, where we are, and summarizes ‘how’ we will achieve our ‘theory of change’ for the next few years.

We hope you will join us to spread the word as we come together as a single community, sharing the resources and knowledge we have to improve the lives of under resourced communities.

Tracey Morrell
BOARD CHAIR & CO-FOUNDER
THE PHILANTHROPIC LANDSCAPE IS CHANGING

Global trends include: a reduction in individual giving and more localized giving, a decrease in trust of not-for-profits, an expanded definition of philanthropy and philanthropists, and a heightened attention to performance measures. All these factors are taken into consideration as we plan for the next few years and how best to focus the resources of our small and amazing team.

The three pillars of our work for 2022-2027 will be:

**COMMUNITY ENGAGEMENT**

We are delighted to be able to meet our community in person again at events and through travel. We are excited to announce our first trip in two years will be to Oaxaca in Spring 2023, to visit our new partners in our newest region.

**EXPANDED PROGRAMMING**

Our learning network has been highly valued by our partners since GoPhil began. And because of its value, this network, the capacity building and cross-learning opportunities are all being further developed to be much more comprehensive and foundational to our work.

In addition, a formalized exit strategy is being created to ensure partners have the skills and resources in place to become stronger by securing broader support and funding to either supplement and/or replace GoPhil funding.

**SHARING OUR SUCCESSES**

We have been working with a model of trust-based philanthropy for years now, which simply means addressing the inherent power imbalance between funders and recipients. It just seemed the most “just” way to work. Now it is time to really get the word out and share those principles as well as celebrate our team, partners, and community and all that has been achieved.
Our Values

We Believe...

• That sustainable impact is not made in isolation.
• Those closest to the problems understand the issues more deeply.
• People and communities are strongest when they do for themselves.
• “Listening and Learning” is more effective than “Serving and Solving”.
• Partner organizations are “leading change” as opposed to “receiving help”.
• In transparency and the power of trust-based philanthropy.
• In promoting equity and honoring diversity in all our relationships.
• That creating purposeful networks of donors and partners has great power in creating change.

Mission

To create strong connections, promote collaborative action and mobilize resources for positive change.

Vision

A more just and equitable world where communities and organizations have the power and resources to create positive social change.

Who We Are

Our Partners and Their Communities

GoPhil partners with around 20-25 active organizations at any one time. We commit to supporting partners and their grassroots communities during fragile stages of their growth as well as funding seed grants and new programs.

4 Partners in Cambodia
- Free To Shine
- HUSK Cambodia
- Journeys Within Our Community
- PEPY Empowering Youth

6 Partners in India
- AVANI Women and Children Rights
- Equal Community Foundation
- Shakti Shalini
- SPID/SMS Center
- TARA Child Protection and Empowerment
- Vikalp Sansthan

1 Partner in Laos
- Laos Education Opportunities Trust

3 Partners in Guatemala
- Aula Mágica
- Comunidad La Esperanza
- EntreMundos

3 Partners in Nepal
- Child Rescue Nepal
- Collaborative Schools Network
- PHASE Nepal

1 Partner in Kenya
- Maji Moti Enkiteng Lepa School

2 Partners in Mexico
- CANICA
- Una Mano Para Oaxaca

2 Partners in Vietnam
- Blue Dragon Children's Foundation
- Children's Educational Foundation

Problem Statements

• Marginalized communities across the world struggle to access quality healthcare, education, and human rights.
• Grassroots organizations are best placed to be the “first responders” in these communities yet receive just 2% of global aid.
• Many grassroots organizations are working in isolation, with leaders who feel alone and unable to share their challenges with others.

• Grassroots organizations struggle to access funding for the core operational costs needed for them to become sustainable.
• Donors often want to do more than just write a check but are afforded few opportunities to learn and become more active in the philanthropic initiatives, issues, and countries that most interest them.
• Traditional power dynamics and imbalances between donors and grantees are harmful and ineffective in achieving positive social change.
Past Strategic Goals and Impact to Date

The main themes of the 2018-21 strategic plan were around transitioning a largely volunteer-led organization into a scalable, sustainable organization run by a paid staff and supported by systems that would allow for growth while remaining true to our core values.

Key milestones included:

- Recruiting paid staff for key positions in programs, operations, and development.
- Transitioning the Co-Founders into mentoring, oversight, and ambassador roles.
- Continuing to build the community and deepen donor relationships matching their passions to global interests and positioning GoPhil as a resource for family foundations.
- Creating deep connections with our program partners through learning events and travel.

Achievements:

Transition to Staff Led

- Directors of Programs, Operation and Development were appointed to run GoPhil in a shared leadership model, supported by our Latin America Programs Coordinator and a Communications Specialist.
- The Co-Founders all transitioned to roles that complemented their personal strengths and allowed them to continue to support GoPhil.

Community development

- Our Founders Circle, a much-appreciated and dedicated group of donors supporting GoPhil at its core, grew from 12 to 15 households.
- Family and other Foundation support within our community grew from 10 to a whopping 41.
- Our critical volunteer Ambassador group continued to spread the word and represent us within their communities.

“Once GoPhil hired a full complement of staff, I was able to move out of my 11+ years of day-to-day operations and spend more time providing mentoring and support to the team. It has been gratifying to provide advice and assistance in the areas of donor and community relations, networking and education and some special projects. This feels like a great way to honor GoPhil’s history while advancing its mission and vision...and, for me personally, to continue to contribute to the organization and its people.”

Linda DeWolf

“After 10+ years of building GoPhil and living in the details, it was time to take a step back and give the directors space to expand into their roles, make them their own and grow as a team. I feel incredibly grateful to have been invited back as Board Chair and continue my love and passion for all that GoPhil is and does through a broader lens of oversight and governance.”

Tracey Morrell

“We had spent years helping our global partners move from a place of fragility to one of strength and solidity and it was time to live that out within our own virtual walls. This transition required new ideas, passion and energy around our own table and a dedicated focus in our ability to sustain ourselves long term. Moving away from being a volunteer Co-Founder-led organization felt like a natural evolution and allowed GoPhil to stay mission focused. Personally, I am thrilled to be expanding into a place where I can contribute to GoPhil in different ways and hope to continue to offer meaningful travel experiences that foster deeper connection to our shared humanity.”

Lydia Dean
Opportunities to Connect

- Hub events and opportunities to travel continued until March 2020, when covid stopped all travel.
- GoLearn was launched as a virtual platform enabling new ways of connecting and learning about key issues and programs.

Program Expansion

- Capacity building programs in Guatemala, India, and Southeast Asia, strengthened our partners individually and as a community.
- Seed grant programs were launched.
- A new region was researched, and several new partner organizations were fully vetted.

Internal Strengths

- New financial and more efficient donor management systems were implemented to support GoPhil’s growth.
- Development of an annual partner feedback survey enable us to strengthen and improve our partner support and processes.

And then COVID hit.
Travel and local Hub events immediately stopped... jobs were lost, pressing needs were everywhere and especially close to home, and yet, all of our partners kept working, the needs of their communities were more pressing than ever, and basics such as food and water were in incredibly short supply.

The beauty of being a small organization is that you can easily redirect if needed, and we did. The Rapid Response fund was quickly formed to support our partners in crisis. We were absolutely overwhelmed by the generosity of our community, who all came together to enable our partners to carry on their critical services during the pandemic.

Unfortunately, the struggles due to COVID faced by a couple of our partners were overwhelming and their organizations suffered great, and sometimes debilitating, challenges during this time.

Travel and Hubs were replaced by a series of virtual GoLearn events as we all wondered when we might be able to travel again, but we also realized we could still meet our goals of connecting our community with our programs, but the ‘how’ had changed. During this time, we reflected deeply on the essence of what we do and the ‘change’ we wanted to see and decided to focus everything we do around how it directly contributes to that ‘change’, something we had been thinking about for a long time.

Thus, the Theory of Change was created.
GoPhil’s Theory of Change

GoPhil believes that long-term, sustainable social change occurs when community-based organizations obtain the resources they need to execute their missions and when donors are educated on the full impact of their giving.

By connecting donors interested in education, health, and human rights with community-led organizations, we can create a shared responsibility capable of driving change at the local level. So, we reflected internally and evaluated the current philanthropic landscape extensively.

In this second phase of GoPhil growth, and with ten years behind us, we made minor adjustments to our mission and vision statements and reaffirmed our values and problem statements to create a map of how GoPhil and its greater community create social change.

_The philanthropic landscape continues to shift, and GoPhil has positioned itself to be nimble and ready for it._

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**OUR THEORY OF CHANGE**

**GoPhilanthropic Inputs**
- Flexible Grants for Partner-Identified Needs
- Supporting Partners to Diversify Funding Opportunities
- Facilitating Cross-learning & Networking Opportunities
- Identifying Effective Community-based Organizations
- Training, Capacity Building & Advisory Support
- Creating Spaces for Donor Engagement & Learning
- Connecting Donors to Organizations to Meet Philanthropic Goals

**Target Groups**
- Community-based Organizations & Their Leadership

**Outcomes**
- Community-based Organizations Have Resources, Support & Connections To Amplify Their Impact
- Increased Donor Awareness About Global Inequities & Active Participation in Responsible Philanthropy

**Impact**
- Increased Funding
- More Scalable Initiatives
- More Visibility for Initiatives

**Responsible Donors & Resilient Community-based Organizations Collectively Working Towards A More Just And Equitable World**
The Next Five Years

Our Priorities

In order to truly capture strategic goals reflective of our Theory of Change, we dived in deep and challenged ourselves to see things from a broader perspective, understanding that forming the future from strictly an internal perspective can keep us siloed and single tracked. GoPhil has always lived up to a challenge and asked hard questions so the processes in defining these outcomes were no different.

Our objectives for the next 5 years:

**Objective 1:**
Support partners to become stronger and more sustainable.

**Objective 2:**
Enhance donor experiences and expand new donor outreach.

**Objective 3:**
Ensure GoPhil’s sustainability through future growth and strengthening internal operations.
Goals to Meet the Plan

**Objective 1:**
Support partners to become stronger and more sustainable.

- Effectively manage our partner portfolio by vetting new partners, developing existing partners and supporting longer-term partners to completion or a fiscal relationship.
- Increase capacity building and cross-learning programs.
- Re-establish GoPhil’s partner advisory board to ensure best practices in grant-making and social change.
- Support partners in diversifying their funding sources.

**What Success Will Look Like**
- A strong collection of partner success stories, including “in the field stories” as well as stories of effective cross-learning among partners.
- Annual partner feedback survey and end-of-grant cycle reports reflect enhanced satisfaction, skill development, and learning.
- Partners receive diversified funding from new sources.

**Objective 2:**
Enhance donor experiences and expand new donor outreach.

- Re-engage the GoPhil community in person.
- Continue to build the community and deepen donor relationships matching passions to global interests.
- Expand the GoPhil community through sharing our successes.
- Attract new prospects who value our work.

**What Success Will Look Like**
- Re-establish a GoPhil community events calendar.
- Increased participation at in-person, GoLearn, and online events.
- Maintain an above average donor retention rate of 40-45%.
- Launch new and appealing ways to support GoPhil’s work.

**Objective 3:**
Ensure GoPhil’s sustainability through future growth and strengthening internal operations.

- Increase organizational visibility and positioning to establish GoPhil as a leader in trust-based philanthropy.
- Continue to develop an inclusive and dedicated global team and Board of Directors.
- Continue GoPhil’s ongoing focus on transparency and accountability.
- Continue to implement best practices and adjust strategic planning to meet the changing landscape.

**What Success Will Look Like**
- GoPhil will be a recognized leader, participant and speaker in well-known trust-based philanthropic circles.
- GoPhil will achieve Gold Status on Charity Navigator.
- Our Board, team and advisory panel will actively reflect our diversity and inclusion principles.
- GoPhil will continue to achieve and/or surpass all budgetary goals.
Financials

Our grant-making philosophy continues to follow a trust-based philanthropy model, believing that those closest to the problems have the greatest insight on how to solve them. Our grants support our partners and their communities’ greatest needs, and we are grateful for the generosity of our donors and openness of our partners in working with us.

Explanation for FY 2020 to FY 2021: Due to the great success of the Rapid Response Fund, several annual donations were received earlier than usual, falling into the previous fiscal year. Changing personal circumstances due to Covid and expanded local needs, saw increased attrition in FY2021. We were fortunate to receive two specific grants for our own operational development in FY 2019 and FY2020.

GoPhil continues to manage costs carefully, ensuring the maximum benefit is experienced by our partner organizations. We could not do this without our efficient and loyal staff, for whom we are extremely grateful.

### Operational Margins

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<th>Year</th>
<th>Revenue</th>
<th>Direct Grants and Capacity Building Grants to partners</th>
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<tr>
<td>FY2017</td>
<td>508,545</td>
<td>368,890</td>
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<tr>
<td>FY2018</td>
<td>512,427</td>
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<td>FY2019</td>
<td>730,740</td>
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<td>FY2020</td>
<td>759,895</td>
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<td>FY2021</td>
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*Increase due to Rapid response funds & grant for special operational projects*
Three years ago when we wrote our previous Strategic Plan, we had no idea what was to come. With the impact of COVID, it was made clear that we can create the best of plans but always need to be ready and flexible for anything to transpire, as we saw with our last three year plan pre-COVID. In publishing our plan, we affirm our commitment to our partners and their communities, united in working together towards a more just and equitable world.” so brings us back to our vision.

We hope in looking back five years from now that any challenges we might have faced in delivering this plan are seen only as new opportunities to learn and grow, paving the way for an even stronger future.

Sincerely, GoPhilanthropic Team

gophilianthropic.org