



STRATEGIC PLAN 2018 - 2021

Background

As the fourth year of our last strategic plan draws to a close, it is time to identify and further refine goals for the next three years. In late 2017, we began reflecting on our next stage of development and consulted with Astrid Koch, who conducted critical strategic research on our behalf. Our goal was to position GoPhilanthropic for greater impact and focus for this next chapter. As a result of Astrid's research we found that our biggest challenges, as well as opportunities, were in the areas of: sustainable funding, positioning of GoPhil travel, aligning for impact, scaling/sustainability, ensuring strong program partners and redefining philanthropy. With this added information from Astrid's survey to staff and customers, plus a review of our goals to date as well as key philanthropic trends, we began to ask ourselves the following questions:

- How will GoPhil communicate effectively and seamlessly across an increasingly diverse donor base?
- How might we leverage existing and new partnerships to enhance and expand capacity, knowledge and available resources as GoPhil grows and deepens its commitments?
- What is the relationship between GoPhil Travel and the Foundation?
- Does growth necessarily mean scaling up?
- How might we most effectively diversify our donor base?
- What's the best way to position GoPhil as an expert on informed philanthropy?
- What are we currently doing that no longer fits?
- How can we continue to grow while maintaining our "secret sauce", i.e. the personal touch?

Delving into these questions provided the basis for the next three year strategic plan.

Overview

During the last few years GoPhil has grown from an organization led by three volunteer Co-Founders, to an active, robust and virtual team of eleven people. The team has enabled us to know our NGO partners more intimately and do more of what we do best, keeping philanthropy personal, engaging and transparent.

Primarily still a volunteer organization, a few strategic part time overseas positions are now paid. Our deeply appreciated Founders Circle members have provided the ongoing support and funds needed to take this step, expand our team and invest in our long term sustainability.

As we look to the future **our strategic vision for GoPhilanthropic is to be a niche foundation providing ~ 500 donors, family foundations with high quality, customized giving options that match passions and global interests. In doing so, our intent is to enhance the capacity and sustainability of innovative, high impact, small grassroots NGO's in our regions.**

To achieve this vision the next steps are:

1. To secure a few key US based volunteers and employees to perform operational roles such as donor cultivation which requires a minimum number of committed hours and has a time sensitive component. The goal is to fill these roles as soon as possible and interviews are underway.
2. With critical new operational staff in place, the Co - Founders can focus on key strengths, relationship building, operational oversight and new opportunities, while at the same time mentoring and grooming a highly functioning team of talented people.
3. With these first two steps in place, we envision considerable growth, as we position ourselves as a valued resource for family foundations and others, leverage partnerships, maximize our Hubs and Travel and pilot overseas GoPhil fundraising opportunities. These long term opportunities will take at least a year to come to fruition.
 - a. This growth will allow us to create one or two leadership roles within GoPhil: to manage Operations and to manage External Communications, Fundraising & Relationships. After an initial transition period, to be determined, these leadership roles would ultimately replace the Co-Founders. The Co-Founders would continue to be Ambassadors for GoPhil, advise and offer support as needed.
 - b. These US based roles could be filled in a variety of ways: either internally or externally, sequentially or at the same time. Should a candidate present themselves who we believe could span the full range of both roles, we would consider that; however, for planning purposes we envision two part times roles vs. one full time role.



This critical step of moving towards paid US staff takes careful planning and thought. In order to fund these positions, GoPhil needs to continue to grow until it reaches financial critical mass, while continuing to honor its commitment to grant 75% of donations received to our partner NGO's. These financial goals must be balanced with investment in ourselves and operating a lean, efficient organization.

In order to achieve this growth, the Co-Founders need to spend more of their time nurturing future opportunities, networking, and expanding partnerships in order to grow our community of donors.

This plan, details our approach and investment in the GoPhil team and its committed community members, such that the Co-Founders can groom for GoPhil's future leadership and generate opportunities for continued success.

Core Values

Our values have and will continue to represent the cornerstone of our organization and will provide the guardrails to our growth. Identifying ingenuity at the local level, facilitating partnership and collaboration, encouraging personal, one-to-one, active, and engaged philanthropy embody the core values and essence of GoPhil. As we look to the future to expand our reach in terms of donors, regions and programs, we will remain dedicated to the following elements and differentiators:

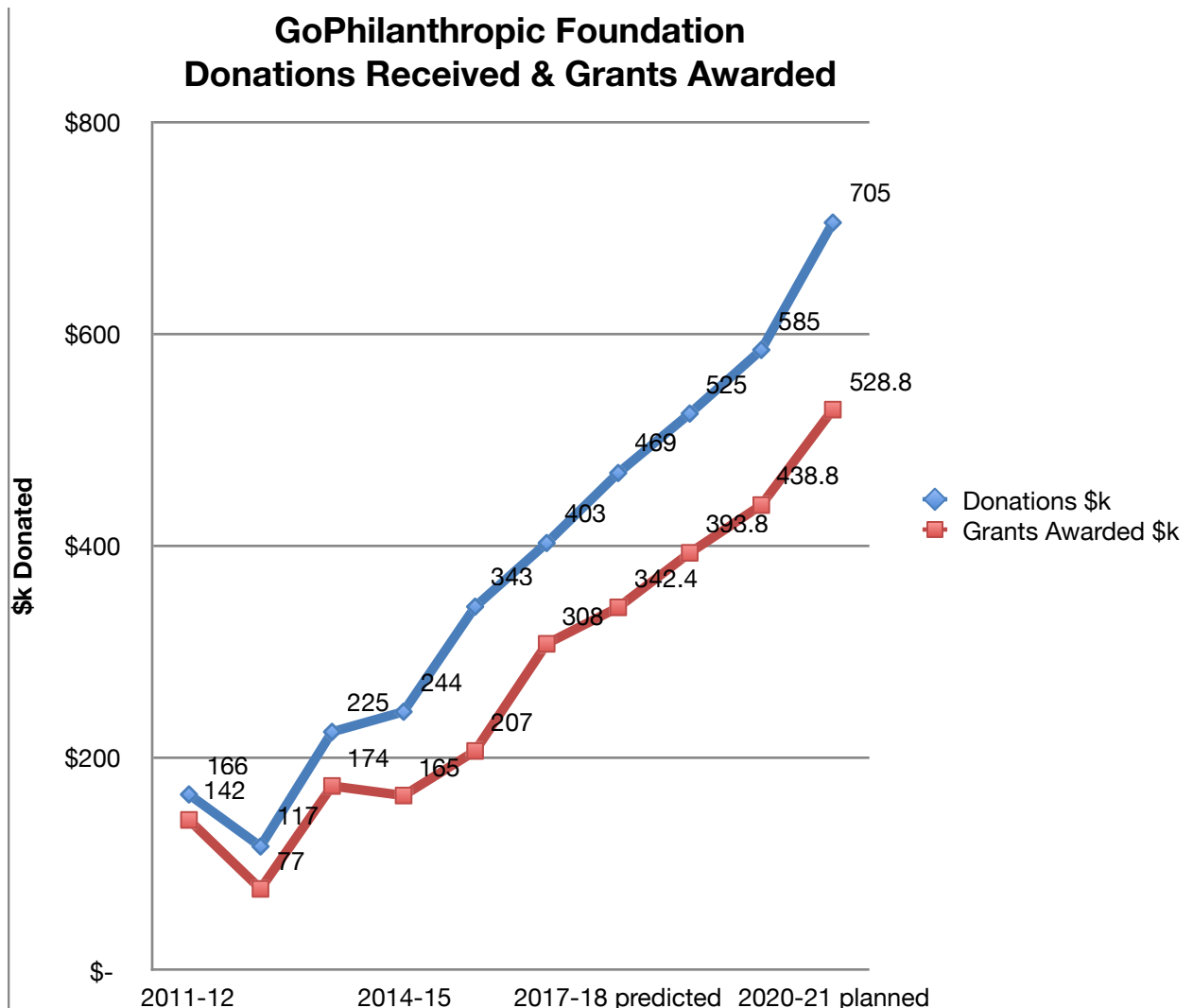
1. **Donors:** Commitment to personal relationships
 - a. Customized proposals for donors aligning with their passions
 - b. Personalized and timely communication for donors
 - c. Honesty and transparency in all communications
2. **Partners:** Wholistic partnerships that provide the NGO's with support, capacity building, networking and learning opportunities, funding and a focus on sustainability.
3. **Team:** A strong team based approach with honesty, open communications and learning at its core.
4. **Access & Engagement:**
 - a. Travel: Through our relationship with GoPhilanthropic Travel, we will continue to offer increased access to the programs we support.
 - b. Hubs: We will continue to offer Hubs in strategic locations where there is energy and critical mass for support.
5. **Cross Learning and Networking:** We will continue to offer a global learning platform for our NGO partners and ourselves through:
 - a. Annual network meetings by region and quarterly update skypes
 - b. One to one critical shoulder time with partner organizations.

Financial History & Goals

GoPhilanthropic has a history of budgeting with prudence in terms of donations and thoroughly in terms of expenses. This approach has allowed us to meet budget expectations consistently year on year for the last 4 years of the prior strategic plan and achieve our internal goals of managing administration costs to ~ 10% of donations received and program expenses to ~15% of donations received, allow the majority of funds to be directly granted to our partner programs.

As we plan for the next three years we are continuing this approach. There are currently additional prospects and opportunities but until we can count on them with certainty, we have chosen not to reflect them in the budget.

We are looking to grow significantly in the next three years and it is reflected in the budget as a short term increase in running costs as we put in place the staff and groundwork to allow for this growth.



	BUDGET 2018-2019	BUDGET 2019-2020	BUDGET 2020-2021
--	---------------------	---------------------	---------------------

Assumptions

Restricted Donations to programs	\$450,000	\$500,000	\$600,000
<i>Individual Donors</i>	\$400,000	\$400,000	\$450,000
<i>Family Foundations</i>	\$50,000	\$100,000	\$150,000
Founder Circle	\$70,000	\$80,000	\$100,000

Donations specific to admin costs	\$5,000	\$5,000	\$5,000
Total Donations	\$525,000	\$585,000	\$705,000

Budget for Running GoPhilanthropic Foundation

Founders Circle Funds	\$70,000	\$80,000	\$100,000
Donations specific to admin costs	\$5,000	\$5,000	\$5,000
10% Retained for Operating Costs	\$45,000	\$50,000	\$60,000
Total Income for Running Costs	\$120,000	\$135,000	\$165,000

Administrative Expenses

Administration Overhead Operational	\$15,622	\$19,492	\$20,542
Marketing/Fundraising	\$22,250	\$31,550	\$24,050
Special Projects	\$3,000	\$2,000	\$2,000
Admin Staff Costs	\$12,000	\$32,513	\$38,950
Total Admin Cost	\$52,872	\$85,554	\$85,542

Admin percentage of Total Donations	10%	15%	12%
--	------------	------------	------------

Program Expenses

Program Related Staff Costs	\$40,518	\$44,140	\$50,976
Grant Management & Region Dev.	\$17,000	\$20,000	\$20,000
Capacity Building/Cross Learning Mtgs.	\$8,000	\$8,000	\$8,000
Total Program Development	\$65,518	\$72,140	\$78,976

Total Running Costs	\$126,390	\$165,694	\$172,518
Total Running Costs as a % of total Donations	24%	28%	24%

Fundraising/Growth Strategies

Travel

There is a huge vacuum in the field of philanthropic travel. Thanks to our partnership with GoPhilanthropic Travel, we can fill that vacuum from vast experience and integrity. Travel remains one of the most powerful elements of our fundraising model while also reflecting our values rooted in personal engagement and global

learning. The majority of our committed, long-term donors have connected in person with the programs they support. Most new travelers also donate to partner programs as a result of what is often described as a “life changing” GoPhil journey experience. In early 2018, we began broadening our offerings alongside fine tuning our processes and marketing. GoPhilanthropic Travel updated their website, refined the system of booking and reservations and created more streamlined guiding protocol, all of which will support GoPhilanthropic Foundation's ability to expand in the philanthropic travel arena. In 2018 - 2019, the number of journeys will double, from three to six, and include two new experiences, in Costa Rica and Provence, which will focus more on GoPhil community building--offering travelers background on philosophy and work across all regions. The target for 2019-2021 is to continue to offer at least six journeys per year. Our recent acceptance into the Google Grants Program offers us \$10,000 per month worth of free clicks which we believe will help us in reaching our target number of ten paying travelers per journey.

Social Media

The power of GoPhil social media publicity continues to grow and finds us committed more than ever to curating engaging and powerful content highlighting the work we do while also broadening the exposure of GoPhil partner programs and their remarkable initiatives around the globe. We enjoy a rapidly growing audience and are continuing to create content that inspires and empowers GoPhil partners, donors, ambassadors and friends. In just over a year of concerted effort on social media, we have gained a robust audience (1998 followers on Instagram, and 1220 friends on FB), now making up 20% of our website visitors. Our 'GoNews' channel, from which users can discover meaningful media that is full of knowledge, and ultimately, is proving highly valuable to share with and inspire friends, family and colleagues. Our blog articles receive the most views on social media by far, indicating that our audience react to in-depth news as opposed to single posts. Additionally, with careful consideration we will continue to grow our social media reach as we stay up-to-date on the latest trends, social media platforms and strategies to optimize the reach of content we create and share. Our ultimate goal is to design a digital stratosphere in which people are able to learn, be inspired and ultimately, create positive change.

Hubs & Events

The overall goal of the GoPhil Hubs, launched in the fall of 2017, is to educate, inspire and engage GoPhil donors and potential donors. Our strategy is to create geographically based groups of like-minded individuals in order to expand the reach, depth and “stickiness” of GoPhil. This past year we have hosted a total of 7 Hubs in Denver and in Santa Fe. Over this period of time we have learned a great deal about organizing these events and about the uniqueness of each market. Typically about 20 people attend and usually about 1/3 are people who have not attended a Hub before...sometimes they are new to GoPhil; sometimes not. The content of the 2 Hubs has been consistent and has related to our travel opportunities and the regions we work in, i.e. Guatemala, SE Asia and India thus far. Our approach mirrors GoPhil values, i.e. small, intimate, cozy, and has been “soft sell” to date with approximately 6 people signed up and/or expressing interest in GoPhil trips and a handful of donations in the \$100-500 range. We anticipate continuing to grow travelers and donors through this pipeline strategy. The next Hub is a joint gathering in conjunction with the GoPhil event in Santa Fe in July. Our longer range plan is to:

1. Introduce at least 2-3 new Hubs per year (planning 3 new ones for 2018-19 in BC, UK and LA) , based upon interest and identifying champions
2. Explore more direct fundraising opportunities.

Founders Circle

Since May 2016, the Founder's Circle program has been successfully offering GoPhil the investment funds needed to expand its wingspan. We have 12 committed members (individuals and/or couples) who invest \$5K per year specifically for GoPhilanthropic's own critical internal development such as hiring staff,

developing new regions and expanding our communications/PR tools. While we expect there might be some attrition each year, our goal is to steadily increase the number of members to 20 by the end of 2021. The Founders Circle represents a very important element of our strategic plan as it gathers a core group of individuals who are willing to express a deeper devotion to GoPhil's work and who are invested both intellectually and financially in the future of the organization. The Founder's Circle also provides the backbone for us to be able to sustainably scale and grow in most of the needed areas outlined in our plan.



Family Foundations

There are estimated to be up to 77,000 private family foundations, more than 201,600 donor-advised funds; and more than 91,000 charitable remainder unitrusts. Collectively, these funds represent more than \$685 billion in private philanthropic capital with Family foundations giving away approximately \$21.3 billion in grants in 2011. It should be noted, however, that 3 out of 5 family foundations hold assets of less than \$1 M. Family foundations and these other types of funds are an ideal match for GoPhil. Out of our nearly 300 active donors, we have been growing family foundation/donor designated relationships and at the present time they represent about 15% of our total number of donors. We find that this group of donors appreciate GoPhil's careful vetting and partner management process as well as the opportunity to travel to see the impact of their giving. A strategy in FY 2017-18 has been to more aggressively identify and seek out these family foundations. Through our research, we have found that a multitude of family foundations are small and do not have websites, listed phone number etc., making it challenging to connect with them. Overall, many of these foundations are, understandably, very protective of their resources and, even when contacted, don't necessarily respond to a reach out. Our moving forward strategy is to:

1. Position GoPhil as a valuable resource to family foundations through references from other family foundations, our website and in our interactions (our ability to offer broader base of vetting, reporting, and onsite visits...ie manage the heavy lifting they might not have the capacity to do)

2. Recognize that most of the fruitful relationships we have built in this area have been as a result of a family foundation finding and seeking us out as a resource
3. Attend at least 1 family foundation based event / conference per year, positioning us as a valued resource.
4. Overall, our goal is to attract an additional \$50 K from new family foundations to GoPhil over a 3 year period.

International Registration

The global potential for GoPhilanthropic Foundation has always been at the forefront of our minds as very few organizations offer our personalized brand of philanthropy coupled with access to the grassroots partners being funded.

The conversation on global expansion has focused mainly on Canada and the UK, as potential regions with the UK being the most promising pilot at the moment.

UK Pilot Opportunity

- GoPhil already has several funding opportunities in the UK including corporate prospects and several UK donors. We also have a critical mass of GoPhil community members in the UK to undertake setting up a low risk pilot for GoPhil UK
- Many of our current NGO partners have links to the UK and travel there to promote their work annually and to fundraise
- This model will offer an expanded fiscal sponsorship offering for the majority of our partners
- Having multiple country registrations makes GoPhil a more attractive partner for NGO's looking for a single global fiscal partner vs many.
- The UK has a strong concentration of India /Nepal diaspora
- Our goal here is to be more directly focused on fundraising for specific partners, while offering unique travel opportunities.

Operational Goals

Systems –During this coming fiscal year we will focus on the implementation of new systems for donor and financial management. These changes follow a thorough review of options that meet our current needs and will allow us to grow. Key functionality will help us segment the donor base and tailor processes to optimize donor cultivation, donor retention and donor development.

A growing team - Our team will continue to evolve and grow in order to take full advantage of the increased number of donors, programs, personal aspirations and opportunities.

The three Co-Founders will remain very much involved in GoPhil, although look for an evolution in their respective roles. All agree their time is best spent where the Foundation has the strongest need and where our current passions lie such as cultivating opportunities, attending events and raising the visibility of the foundation, rather than in the day to day operational aspects of the Foundation. Several changes will be made to support this vision:

Lydia is focused on mentoring new staff, communication and branding for the Foundation as well as building GoPhil Travel, and will be supported by

- Travis – Director of External Communications
- Karen – Sponsorship Communications Liaison (volunteer)

- NEW - Donor Cultivation Liaison. We are currently seeking a volunteer for this position.

Tracey currently focuses on operations and will be recruiting a team to allow more of a mentoring and special projects role.

- Emily – now based in London, will become the Director of Global Programs with two distinct roles:
 - Setting up GoPhil UK as a fundraising arm for GoPhil
 - Grant Management oversight and support for all GoPhil regions, led specifically by
 - Christina – Guatemala - Regional Development Liaison
 - Gemma – SE Asia – Regional Development Manager
 - Emily - Africa
 - Emily- India/Nepal. Continues to directly manage this region.
- NEW - Director of Operations – Jill Roeder has just come on board, currently as a consultant, to fill this GoPhil operations and processes role.
- Financial Support – potentially to be outsourced to Jitasa, an organization of CPA’s specializing in offering financial and accounting services to non profit organizations. Their unique cloud and team based approach ensures there is always someone on hand to answer questions and the client can access information at all times.

Linda will continue to focus on external relationships/donor development as well as provide mentoring for new staff members. She will be supported by:

- Laura – grant opportunities and research
- Hubs - overall strategy -Anne Elgerd/Lydia and Hub teams
- Amy Leonard/ Jeanie Mamula – Denver Hub
- Christina Bruce/Linda – Santa Fe Hub.

NEW - Executive Director - the medium term goal would be to appoint an Executive Director who would primarily focus on strategy and fundraising opportunities for GoPhil. Based on the successful execution of the plan, including fundraising, and team growth, we anticipate our goals being achievable before 2021.

Programmatic Goals

- Continue to create geographic clusters of partner organizations in regions that are high in need and traveler accessible
- Further develop the mix of high touch and low touch organizations in each cluster, i.e. “babies” needing lots of work and stronger organizations,, to optimize shared learning opportunities and greater regional impact
- Maintain up to date mapping of key organizations working within our areas of interest
- Re-evaluate and develop a plan for each GoPhil region. Create a pipeline of possible program partners for each region moving into the future
- Develop capacity building tool kit for partner program support and sustainability.



We find ourselves excited and energized by this 3 year plan and feel it provides us a roadmap for the myriad of possibilities we can achieve together as a GoPhil Community.