



# 2024 - 2026 Strategic Plan

We cultivate the conditions for philanthropy to best serve our communities. Through the synergy of people, organizations and our ecosystem, Philanthropy Northwest catalyzes positive transformations that endure and resonate far beyond the scope of individual initiatives.



# Mission

We grow philanthropy's capacity to do transformative work toward redistributing resources and power to underinvested communities in the Northwest and beyond.

# Vision

Equity and racial justice for all communities.

# Our Values

EQUITY  
RACIAL JUSTICE  
PLACE  
INTEGRITY  
COURAGE  
JOY

# INTRODUCTION

In December 2022, Philanthropy Northwest ('PNW') embarked on a strategic planning process to redefine our organizational mission and establish strategic priorities over the next three years. A new strategic plan is essential to directing and advancing Philanthropy Northwest's work with intention and impact in our complex context – a philanthropic sector interrogating its practices and priorities following the COVID-19 pandemic and the country's racial reckoning, the Board's adoption of our last strategic framework in 2015 and a significant organizational leadership transition. To guide our year-long process, we engaged strategic planning consultants Angela Powell and Katie Diamond of Imago, LLC, and formed a strategy development committee inclusive of board members and staff.

This document is a culmination of all the work completed in this process from January – November 2023. This strategic plan is an adaptable "living document" – a true "roadmap" rather than a "plan." It is meant to guide Philanthropy Northwest in our forthcoming strategic direction rather than define every step. We will iterate and revise the document as it is used in response to changes in our organization's environment as well as internally identified needs.

Following the Executive Summary, our Strategic Plan is organized into the following sections:

- I. Current Focus & Scope, including Comparative Analysis
- II. Trend Analysis: External & Internal Themes
- III. Unique Contribution
- IV. Case for Change
- V. Vision, Mission & Values
- VI. Future Business Model
- VII. Big Question
- VIII. Strategies & Tactics

# EXECUTIVE SUMMARY

Philanthropy Northwest is leaning into a new mission for the organization to support an evolving philanthropic sector as we approach our 50th anniversary in 2026.

We believe philanthropy must support their grantee partners to self-determine and drive their work on behalf of the communities they seek to serve and, ultimately, to achieve more equitable quality of life outcomes for all people, regardless of race, ethnicity and other intersectional identities. And yet, our sector has under-invested nationally in many of the communities present in our region.

Over the next three years, we aspire to grow the capacity of philanthropy in our region to redistribute resources and power to underinvested communities in the Northwest. We will work to:

- Build relationships and facilitate learning to surface and spread equity-centered philanthropic practices through peer learning; customized equity-centered programs and consulting support aligned to the diverse needs of the field; facilitating learning and relationships between the sector and nonprofit partners and Indigenous communities; and developing knowledge assets, toolkits and data-informed analyses.
- Support the equitable distribution of resources to organizations and communities historically overlooked by philanthropy through the promotion of trust-based and participatory practices; structural shifts through public policy and advocacy; management and distribution of pooled philanthropic and public resources as an intermediary; and growing our relationships with donor advisors and private financial institutions.
- Ensure a thriving and sustainable organization to support healthy culture and growth to invest in and retain our talent, diversify our resource base, and strengthen our brand and value-added positioning.

# I. Current Focus & Scope

The strategy development process began with an assessment of Philanthropy Northwest's current business model as a reference for the directional changes we would pursue.

Our current geographic footprint includes the states of Alaska, Idaho, Montana, Oregon, Washington and Wyoming. We provide programming and services to 150 philanthropic members in this six-state region. The Giving Practice ('TGP'), the national consultancy of Philanthropy Northwest, provides consultative support to PNW members as well as to philanthropy organizations across the country.

We are currently funded by foundation grants, earned income (e.g., conference and training fees, fiscal services, job bank and TGP consulting fees), membership dues and in-kind donations. We offer skill-building programs, funder collaboratives, cohort learning structures and issue-based programs; consultative services (through TGP); public policy and advocacy; intermediary support (e.g., fiscal sponsorship and pooled and pass-through grantmaking); and communications, information and advisory resources.

**Comparator Analysis.** As a philanthropic support organization (PSO), Philanthropy Northwest has counterparts across the country serving discrete and complementary geographies. As such, we compared ourselves with three national PSOs to determine our differentiated position. Examining national PSOs enabled us to better understand our position within the larger environment of competitors (or "collaborators") in front of our network. This analysis compared Philanthropy Northwest alongside three other organizations in the areas of clients or people served, media attention and publicity, human resources, funding diversity and availability, programs and services, and mission-related impact.

Key differentiators for Philanthropy Northwest included the consultative services of TGP, as well as our policy and advocacy function. Notably, Philanthropy Northwest's commitment to centering racial equity is prominently manifested in our programming in multiple ways.

# II. Trend Analysis

From February to April 2023, Imago led a comprehensive environmental scan to solicit opinions from a wide range of key stakeholders to inform Philanthropy Northwest's future direction. Feedback and data were collected via three primary methods over this eight-week period: online surveys, virtual focus groups and individual interviews. We collected responses from 102 staff and board members of current member organizations; 133 partners, peers and general community members; eight TGP senior advisors; and 33 PNW board members and staff. The synthesis of these responses surfaced the following themes:

## External Trends

Three primary external themes underscored the context in which we will work over the next few years:

### 1. Political Climate

The political demographics of Philanthropy Northwest's service area are incredibly diverse, representing at a smaller scale the polarization that currently exists broadly across the United States: the country is more politically divided now than at any point in the last two decades. With less shared understanding and collaboration between Democrats and Republicans and increased negative views of the other party's intentions and impact on the nation's well-being, Philanthropy Northwest is faced with navigating differing views among its member organizations and the broader community, ranging from racial equity, climate change, bodily autonomy and gender identity.

### 2. Increased recognition of racial or ethnic wealth, health, education, and representation inequalities and other disparities

Tragically, the pandemic laid bare systemic inequities and the effects of long-term structural racism that is disproportionately affecting the daily lives of Black, Indigenous and People of Color community members. These disparities, caused by the complex interaction of culture, policy and institutions, result in unequal outcomes across racial or ethnic groups and stand to be exacerbated as the Northwest region recovers from the pandemic.

### **3. Economic Uncertainty**

Related, and more than three years on, the COVID-19 pandemic has continued to produce great economic uncertainty. Added to this uncertainty is the changing environment for philanthropy and philanthropy-serving organizations, with growing importance placed on social responsibility in the private sector, culturally responsive and community-driven giving in the nonprofit sector, and individual-driven horizontal giving in the form of crowdfunding or mutual aid. As the giving paradigm and trends evolve, Philanthropy Northwest must consider how to remain stable and relevant within these changing trends.

### **Key Internal Themes**

Three internal themes emerged to consider as we developed a new strategic direction and approach.

#### **1. Philanthropy Northwest will benefit from investing in “Northstar” organizational work to explore and confirm its vision, identity, and who it chooses to center.**

Our organization has the opportunity to bolster alignment around our sense of “who the organization is for” and what is our organizational “why.” Philanthropy Northwest’s current network of member organizations includes broad diversity in perspective and experiences, making it incredibly challenging to meet the needs or views of all. This was evidenced by some who called the organization “too political,” while others stated that the organization is not pushing the sector enough toward change. Establishing clarity in the organization’s identity in this way can help create greater intentionality for the organization internally and externally, from programs to partnerships, allowing for more nuanced engagement with the broad diversity of perspective and experiences held by its members and those in its broader ecosystem.

#### **2. In this rapidly evolving and continuously uncertain time, Philanthropy Northwest can ensure continued relevance and elevated impact by fostering innovative funding approaches.**

A significant theme that emerged from both internal and external stakeholders is a recognition that the organization, and philanthropy in general, is at an inflection point. Philanthropy Northwest has the opportunity to support and encourage innovation around funding models, partnerships, philosophies and cross-sector collaborations while also infusing and exploring the nuance of equity work within philanthropy.

**3. Philanthropy Northwest has the opportunity to increase its visibility and use its power to lead and influence.**

Philanthropy Northwest has strong relationships with its current network member organizations, strong programming and talented staff. These assets, paired with our unwavering commitment to equity and our unique “30,000-foot level” perspective of philanthropy in the Northwest, affords us the potential to influence the philanthropic and broader nonprofit sector in the region and beyond. Yet, as noted by our organization’s stakeholders, Philanthropy Northwest’s visibility and influence is not as strong as it could be.

## **III. Unique Contribution**

Drawing on an understanding of Philanthropy Northwest’s current state, our comparative analysis, and the themes and trends that surfaced from the environmental scan, we sought to define our unique impact and differentiated position within an increasingly competitive ecosystem. Our unique contribution (also known as competitive advantage) is our ability to distinguish Philanthropy Northwest from other organizations based on an asset no other similar organization serving our region has and/or outstanding execution of our services

In defining Philanthropy Northwest’s unique contribution to the philanthropic sector, we focused on our growing commitment to centering equity in our sector’s work, the demand for support to operationalize and actualize this commitment, and our long-standing relationships. In sum:

*We uplift the collective wisdom present in our Northwest region to support philanthropic partners, individually and collectively, in advancing their learning and work in service of greater equity and racial justice through our relationship-first and intersectional lens to designing programs, engagement in policy and advocacy, and delivering values-aligned consulting services.*

# IV. Case for Change

Our vision, mission and values are grounded in the belief that philanthropy must support their grantee partners to self-determine and drive their work on behalf of the communities they seek to serve, in order to ultimately achieve more equitable quality of life outcomes for all people, regardless of race, ethnicity, and other intersectional identities. And yet, our sector has under-invested nationally in many of the communities present in our region:

- Asian American, Native Hawaiian and Pacific Islander (AANHPI) populations received 0.4% of all philanthropic funding in 2021.
- Black-led organizations received 1.5% of all philanthropic funding in 2021.
- Latinx populations received 0.8% of all philanthropic funding in 2021.
- Indigenous populations received less than 0.9% of all philanthropic funding in 2021.
- LGBTQ+ populations received 0.5% of all philanthropic funding in 2021.
- Populations living with disabilities received 2.5% of all philanthropic funding in 2021.

Sources: Asian Americans Pacific Islanders in Philanthropy (AAPIP), Bridgespan/Echoing Green, Disability & Philanthropy Forum Latinx Funders, Equitable Giving Lab, Investing in Native Communities/Candid.

# V. Vision, Mission & Values

In the context of the state of the philanthropic sector, we built from our understanding of where Philanthropy Northwest is and where we seek to go, leveraging our unique contribution, to establish the foundational elements of our new strategic plan.

**Vision** - Our desired future state:

*Equity and racial justice for all communities.*

**Mission Statement** - Philanthropy Northwest's purpose for existence:

*We grow philanthropy's capacity to do transformative work toward redistributing resources and power to underinvested communities in the Northwest.*

**Values** - Guiding principles fundamental to the way Philanthropy Northwest will fulfill our mission:

**EQUITY** - We promote systems and practices that support just outcomes for people regardless of race, ethnicity and intersectional identities, including gender, sexual orientation, socio-economic status, disability, religion and immigration status.

**RACIAL JUSTICE** - We stand for a society where Black, Indigenous and People of Color communities have the dignity, resources, power and self-determination to fully thrive.

**PLACE** - We are inspired and grounded in the diversity of our region's people and cultures, and we honor its lands as the traditional and present home of Northwest Indigenous peoples.

**INTEGRITY** - We hold ourselves accountable for acting in alignment with our values and maintaining high standards of transparency, honesty and openness.

**COURAGE** - We aspire to catalyze change in the philanthropic sector by being bold with our actions and our voice.

**JOY** - We create space for creativity, connection and fun in our work.

# VI. Future Business Model

Our future business model reflects the clarity of our differentiated position, unique contribution, articulated case for change, and redefined vision, mission and values. This model establishes where we will work (our geographic footprint), who we will support (our core audience), how we will provide value (our programs and services) and how we will sustain the work (our funding sources).

SCOPE	INCLUDES	DOES NOT INCLUDE
<b>Geographic Service Area</b>	PNW’s primary geographic region is the Northwest (Alaska, Idaho, Montana, Oregon, Washington and Wyoming). We share reciprocal membership with funders based in Hawai’i, and our national consultancy, The Giving Practice, is accessible to philanthropic organizations outside of our core service area.	Membership is reserved for funders in the six-state region.  <i>(See note below on accessibility of programs services by non-members)</i>
<b>People Centered/Served</b>	Equity-committed philanthropic funders* and practitioners serving communities in our six-state region and consulting clients across the nation.  <i>*We define “equity-committed funders” as those who are committed to the promotion and adoption of systems and practices that support just outcomes for people regardless of race, ethnicity and intersectional identities, including gender, sexual orientation, socio-economic status, disability, religion and immigration status.</i>	

<b>Programs and Services Offered</b>	<p>We work with philanthropic partners who share a commitment to transforming philanthropic practices to advance greater equity &amp; racial justice for communities by:</p> <p>(1) Cultivating learning, connections and relationships, professional development and thought partnership for practitioners in the field;</p> <p>(2) Providing value-aligned and equity-centered consultative support and thought leadership for philanthropic organizations;</p> <p>(3) Pooling, managing and equitably distributing resources to the field on behalf of philanthropic and public sector funders;</p> <p>(4) Advocating for structural shifts through public policy and advocacy.</p>	<p>Note: Some programs or services are member-only, while others are accessible to non-members (sometimes at different fees). Some programs are also accessible to community partners or participants outside of philanthropy.</p>
<b>Funding Sources</b>	<p>Primary: Foundation grants (ideally multi-year)</p> <p>Secondary:</p> <ul style="list-style-type: none"> <li>• Membership dues</li> <li>• Earned income (program fees; job bank; TGP consulting fees)</li> <li>• Administrative fees to manage pooled or pass-through funding</li> </ul>	<p>Any funding that does not align with our values.</p>

# VII. Big Question

To execute against our overarching mission, we recognize the inherent opportunities and challenges in doing so given the key external themes that surfaced from our trend analysis: an increasingly polarized political climate reflected as a microcosm in our geographic footprint; and economic uncertainty for philanthropic serving organizations in an increasingly crowded ecosystem, including funders appropriately prioritizing constrained resources to support community organizations.

We set forth the “big question” that identifies the greatest adaptive challenge (and, therefore, opportunity) we must collectively solve for through our strategies and tactics:

*How can we boldly advance greater equity in the philanthropic sector across our diverse geographic footprint and remain a (financially and culturally) sustainable organization?*

# VIII. Strategies & Tactics

In order to address this big question, we identified the set of primary strategies and associated tactics we will employ over the next three years. These strategies and tactics are intended to work in synergy with one another and be reflected in choices we make about the activities we conduct across the enterprise.

## STRATEGY 1

Build relationships and facilitate learning to surface and spread equity-centered philanthropic practices

### TACTICS

- 1.1 Build authentic and trust-based relationships with and among philanthropy organizations and practitioners to facilitate new partnerships and deepen engagement and investment.
- 1.2 Facilitate learning and relationships between philanthropy, nonprofit partners, and Indigenous and tribal entities to bolster the influence of the community to inform philanthropic practices.
- 1.3 Catalyze peer learning and influence through the design of innovative training and peer network models.
- 1.4 Offer tailored equity-centered programs and services aligned to the diverse needs and demands of the region in response to place-based differences.
- 1.5 Bolster equity-centered consulting services responsive to field demand.
- 1.6 Develop and disseminate knowledge assets, toolkits and data-informed analyses to promote the adoption of equity-driven practices.

## STRATEGY 2

Support equitable distribution of resources to organizations serving underinvested communities

### TACTICS

- 2.1 Advance and promote trust-based and participatory philanthropic practices.
- 2.2 Promote structural shifts through thought partnership, sector organizing and advocacy to inform policies that increase the availability of philanthropic and public resources to underinvested communities.
- 2.3 Manage and equitably distribute pooled philanthropic and/or public resources.
- 2.4 Build relationships with donor advisors and financial institutions to explore equitable distribution strategies.

## STRATEGY 3

Ensure a thriving and sustainable organization to support healthy culture and growth

### TACTICS

- 3.1 Invest in staff and organizational culture to support well-being, professional growth and retention of talent.
- 3.2 Bolster a sustainable financial model through a diverse resource base, expanded membership and earned revenue, effective use of technology and increased efficiencies.
- 3.3 Strengthen brand and messaging to communicate Philanthropy Northwest's identity and value-added role in the philanthropic ecosystem and the community.
- 3.4 Integrate enterprise to build a shared culture, brand and functional efficiencies.
- 3.5 Foster a mindset to identify and implement interdependencies between core lines of service to drive the greater impact of our work.