

2023-2025

Strategic Roadmap

In the spring and summer of 2022, our Board of Directors and staff carefully and critically considered the Sacramento Region Community's Foundation's role in the capital area and developed a new Strategic Roadmap that charges us to grow the philanthropic resources available to the Sacramento region, enhance our leadership activities, and ensure all our efforts are rooted in — and advance — diversity, equity, and inclusion.

I am pleased to share it with you.

In achieving the Strategic Roadmap's goals, we'll position the Foundation to most effectively carry out ambitious work that responds to our region's greatest needs and creates an enduring source of philanthropic funding to make major and meaningful investments in perpetuity. By their nature, these investments will be in the strength of our local nonprofit sector and those who benefit from it — which, after all, is everyone in our diverse, dynamic community.



I offer thanks to those forward-thinking leaders efforts have brought the Foundation to this point, and to you, our partners in the community whom we'll work alongside to advance our mission in the Sacramento region. Because of the commitment and generosity of partners like you over the past 40 years, the Foundation is well-positioned for a bright, bold future.

Let's get started.

Gratefully,

Kerry Wood, CFRE
Chief Executive Officer
January 1, 2023



WITH GRATITUDE

It is with a deep sense of gratitude that we thank those on our Board of Directors who dedicated countless hours to developing this plan for the Foundation's future. Members of our Strategic Planning Committee and Diveristy, Equity, and Inclusion Task Force — which, compiled, comprise the Strategic Roadmap — included Elaine Abelaye-Mateo, Karen Baker, Kathy McKim, Cassandra Walker Pye, Kate Stille, Martin Steiner, Renee Taylor, and Steven Weiss. We are grateful to the Foundation's professional staff, who collaborated with great intention and care throughout this process.

Strategic Roadmap

Toward a Bright, Bold Future

The new Strategic Roadmap charges us to grow the philanthropic resources available to the Sacramento region over the next three to five years and enhance the Foundation's leadership activities. It also ensures our efforts are rooted in — and advance — diversity, equity, and inclusion (DEI).

The development of the Strategic Roadmap was informed by in-depth interviews with diverse stakeholders, benchmarks comparing the Foundation to peers, and reams of internal data. What emerged from the months-long process was an encouraging picture of our collective accomplishments. Also present was a theme that, to enhance our collective impact, we must be bolder. With that insight front-of-mind, we updated our vision and mission statements to reflect our aspirations for the future of our work in the community:

- **Our Vision:** We envision a thriving and resilient region where generosity and collaboration create equitable opportunity.
- **Our Mission:** We lead, serve, and inspire enduring philanthropy for a just and vibrant Sacramento region.

To pursue this vision and advance our mission, the Strategic Roadmap names two principal goals:

- **Enhanced Community Impact & Leadership**
- **Resource Diversification & Growth**

These are supplemented by two supporting goals:

- **Elevated Brand Identity & Communications**
- **Strengthened Internal Capacity**

Additional details about these goals are shared on the opposite page. Each is supported by objectives, and tied to measurable outcomes. Importantly, they are grounded in the principles of DEI, advancing the following areas of focus:

- **Organizational Culture:** We will foster a dynamic and impact-centered environment built on trust and belonging.
- **Human Resources:** We will implement equitable opportunities for staff across all areas of human resources.
- **Governance:** We will ensure the Board of Directors and committees reflect the region, with DEI informing all decision-making.
- **Stakeholder Communications:** We will attract a diverse range of stakeholders and create strong relationships with current stakeholders to inspire generosity that is equitable and inclusive.

- **Community Leadership:** We will foster a more equitable region through strategic investments, convenings, and voice.
- **Programs & Scholarships:** We will ensure the Foundation's processes are responsive to the region's present and emerging needs.
- **Advocacy:** We will publicly support issues that align with initiatives and address communities' needs, especially those impacted by structural inequities.

These are also supported by correlating objectives and measurable outcomes — and, like all of our work, are based in our Core Values, which describe the ways we strive for excellence on behalf of all we serve. Our Core Values are:

- **Leadership:** We lead with courage, speak up, partner with, and amplify community voice, and take informed risks to advance our mission in our region.
- **Stewardship:** We build a philanthropic legacy for future generations through responsible care and management of the resources entrusted to us.
- **Ethics:** We exercise the highest standards of integrity, honesty, and accountability in everything we do.
- **Equity:** We are committed to use our resources and work in partnership with others to address systemic inequities in our region.
- **Learning:** We embrace continuous learning and use data, self-reflection, and the experiences of our community to inform and strengthen our work.
- **Teamwork:** We nurture a joyful, trusting, and inclusive environment where everyone's perspectives are heard and respected.

In pursuing a bolder approach to our work, we are following the model set by the forward-thinking leaders of the past whose efforts have guided the Foundation to this point. Now, as we define the shape of our work into the future, we are excited to work alongside you — our partners in the community — to inspire bold philanthropy in the region for years to come.

The goals of the Strategic Roadmap are based in and enriched by complementary DEI efforts — which, together, support the Foundation's mission.



STRATEGIC GOALS

Resource Diversification & Growth

Focus asset development on high priority fund types and unrestricted contributions to increase the Foundation's investment and impact in the region. This will include increasing expendable and endowed unrestricted gifts and growing legacy giving; celebrating Big Day of Giving milestones and looking to the program's future; and broadening donor diversity so that our fundholderbase reflects the communities we serve.

Enhanced Community Impact & Leadership

Sharpen and amplify the areas where the Foundation invests in the community, and the resulting impact. This will include restructuring our grantmaking areas of focus and serving as an advocate on aligned issues; leveraging funding from within and outside the region to address community needs; and maintaining a capacity-building emphasis to support nonprofits.

Elevated Brand Identity & Communications

Elevate the Foundation's visibility to more strongly position it as the region's philanthropic leader and go-to resource for charitable giving. This will include strengthening communications to increase impact and and inspire investment, and building community by engaging and connecting audiences around critical issues.

Strengthened Internal Capacity

Invest in the staff and resources required to meet the Strategic Roadmap's goals and position the organization for increased leadership and impact. This will include developing an investment plan that positions the Foundation for growth and impact in the future; investing in core internal capacities; and assessing potential adjustments to the business model.

2023

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