

# TRIANGLE COMMUNITY FOUNDATION

2018-2023 STRATEGIC ROADMAP



## IT'S A JOURNEY...

Our community is rapidly growing and changing, and we recognize that we must continue adapting to that change. Our commitment to partnering with donors, investing in local nonprofits, and serving as a resource for community knowledge has been steadfast, but we have gone deeper. We've sought to learn more about the Triangle so we can better understand what challenges exist for those who are marginalized in our community. We've grown into our role as a leader in this region – a leader who knows that we are not equipped to make a difference on our own, but that **we are stronger together**. We've worked with our donors, standing on the shoulders of great visionaries, to make a deeper impact in what matters.

This journey has led us here. There is an urgency for more – a stronger commitment to standing atop the building blocks and working with others to make our community great, and we can't afford to ignore this urgency. Our community needs us, and we are here to answer the call. So we reached out to our stakeholders for input, we reviewed assessments and trends, and we worked diligently with our staff and Board over the last year to develop this guide to the next five years. We continue to honor our legacy and the forward-thinking leaders who brought us to this place. It will strengthen us for the future of both our organization and the community.

We hope you'll see a path for your philanthropy along this strategic roadmap and join us, so that we can make a difference for everyone, together.



Lori O'Keefe  
President & CEO



Pat Nathan  
Board Chair

## AT A GLANCE

### Our Vision

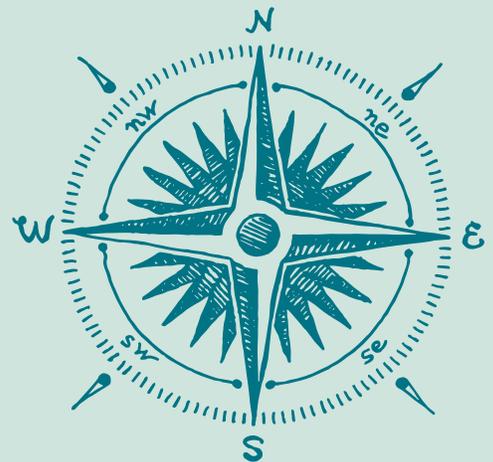
A vibrant Triangle that works together to ensure everyone thrives.

### Our Mission

We inspire and mobilize giving, leadership, and action.

### Our Values

Community | Equity | Leadership | Legacy



## OUR IDEOLOGY

### Our Vision: A vibrant Triangle that works together to ensure everyone thrives.

What do we hope to see when we look into the future for the Triangle? At the Foundation, we are working to enhance the lives of everyone who lives here, and we recognize that we cannot do that alone. To ensure a good and equitable quality of life, we encourage collaboration across sectors to listen, learn, and honor each other's voices, and use innovative approaches to address the immediate needs of our community.



We believe that doing this work together will lead us to a **vibrant Triangle**: a region with a robust arts culture that is accessible to all; infrastructure in place to support health, housing, and human service needs; protected lands and programs that encourage the conservation of our natural resources; an emphasis on the importance of early childhood education and development.



We believe that doing this work together will ensure that **everyone thrives**. When we dismantle barriers that prevent people from attaining their goals, provide resources to ensure that everyone can realize their dreams, and work towards instilling a true sense of belonging for all, everyone thrives. When the people in our region thrive, we will see success in so many facets of our lives, creating a ripple effect, now and for the future.

### Our Mission: We inspire and mobilize giving, leadership, and action.

How do we work to accomplish our vision for the Triangle? Our work is centered around stewardship and service to donors, investing in building strong nonprofits that address the needs in our community, and understanding the Triangle by listening and learning about the strengths and challenges we face. Our founder, George Hitchings, set out to create the Triangle's community foundation in the early 80's with a mission to ensure that everyone who lived here could thrive. We have always lived into this mission; we are proud to stand committed to it today, and we are working to make it more equitable, and inclusive, every day.

#### Giving

**We inspire and mobilize giving** by understanding the most challenging issues in our region and working with donors to activate resources, to make a difference for generations to come.

#### Leadership

**We inspire and mobilize leadership** by working together with the community to invest in strong leaders, nonprofits, and innovative approaches to tackling the region's challenging issues.

#### Action

**We inspire and mobilize action** by addressing the immediate needs in the Triangle, specifically through our focus areas and in partnership with our donors.

## OUR IDEOLOGY (continued)

### Our Values: Community | Equity | Leadership | Legacy

We are committed to living into these values as essential to our success. We bring these values to our work each and every day, for the betterment of the Triangle.



#### Community

We are passionate about our Triangle region.  
We honor diverse strengths, needs, voices, and backgrounds of all people in our region.  
We encourage collaboration and collective giving, and we strive to bring members of our community together.



#### Equity

We strive for equity and focus on people who are marginalized in our Triangle region.  
We listen and learn with our community about the strengths and challenges of our region.  
We recognize the importance of addressing immediate needs and structural barriers.



#### Leadership

We embrace our role in tackling challenging issues that face our Triangle region.  
We invest in building strong, resilient leaders who reflect our community.  
We use innovative approaches to activate resources and make a difference.



#### Legacy

We are committed to making a lasting impact today and for generations to come in our region.  
We develop long-term, authentic relationships with all of our partners.  
We honor the gifts left by visionary and forward-thinking donors and encourage multi-generational giving.

## FINDING OUR WAY: ASPIRATIONAL DIRECTIONS

How do we effectively accomplish our vision for the Triangle? What strategies do we employ to ensure that we are moving forward in this journey? We have identified three aspirational directions to keep us on the path.

### **Cultivate and Inspire** donors and partners who are engaged and representative of the community.

- » Increase donors of all types, especially by race, ethnicity, geography, and age, who give strategically to their own interests and to our focus areas.
- » Foster a vibrant learning community for people to share insights and ideas.
- » Identify investment opportunities to engage donors and align with our focus areas.
- » Amplify the voices of people within the Foundation, and across the Triangle, who care about our community.

### **Build Strong Leadership** within the Foundation and across the Triangle that is inclusive, innovative, and collaborative.

- » Leverage partnerships to act on challenging issues.
- » Activate staff, volunteers, and fundholders to provide leadership on challenging issues, primarily in our focus areas.
- » Expand community leadership opportunities, especially in the nonprofit sector among people of color and emerging leaders.
- » Invest in innovation and experimentation to develop ideas and deploy solutions to challenging issues.

### **Advance Equity** within our organization and through partnerships to address immediate needs and systems change in our region.

- » Provide continued learning about equity for staff, volunteers, and fundholders.
- » Strengthen the Foundation's policies and procedures.
- » Convene dialogue and share research on community strengths and needs.
- » Align resources to focus on marginalized people in the Triangle.



## OUR COMMITMENT

We remain steadfast in our commitment to our mission and values, but we also remember that the building blocks of the Foundation are vital to our success and the success of our region. Our commitment is the foundation for our work with donors and the community, now and for the future. We commit to being a leader, a convener, and a resource and we are excited about what's on the horizon.

### Stewardship & Service

We embrace responsibility for the long-term stewardship of the resources entrusted to us. We value and preserve donor intent. We are committed to institutional excellence and enhanced valuable service to our constituents.

### Strong Governance

We commit to effective governance and oversight, balancing the interests of our constituents and the community with the policies and regulations to which we are held accountable. As a certified National Standards Community Foundation®, we commit to deep rigor with regard to our board leadership, policies, and processes.

### Financial Management

We honor our history of accountability and fiscal responsibility, and we pledge to continue managing our community's charitable dollars with sound and impactful strategies.

### Efficient and Effective Operations

We foster leadership, innovation, and collaboration internally, and strive for continuous opportunities to learn. We seek out best practices for our organization and provide the most efficient and effective services for our donors and nonprofit partners.

### Communications

We commit to amplifying the voices of those in our community while communicating the values of the Foundation to ensure deep and broad understanding of our services, our constituents, and the issues we are addressing.

### Our Focus Areas

We recommit to our four focus areas: community development, environmental conservation, regional cultural arts, and youth literacy. Our work through these focus areas with our donors and the community has made a difference, and we pledge to go deeper into each of them as we strategically increase our impact.

## ONWARD, TOGETHER!

### jour • ney/ the passage or progress from one stage to another

That is how we view our strategic roadmap - as a fluid plan, one that adapts and grows with us so that we can focus on working hard to accomplish our vision for the Triangle.

We don't have all the answers. We know this. A community does not become equitable overnight, nor will we ensure that all children can read by third grade next week, or house every person experiencing homelessness next month. But by working together with our donors, with our region's strong nonprofits, with our community leaders, and with the residents who are the most marginalized, we can create innovative solutions to the challenges we face, making those challenges something we can tackle.

Through this strategic roadmap, we reaffirm our focus areas, rather than change them. We honor the legacy of our forward-thinking donors, and their desire to make our region better. We pledge to focus our partnerships on advancing equity and strengthening leadership. We commit to being a leader, a convenor, and a resource.

**We will be bolder in this journey, we embrace this role, and we are excited for what's next.**

## WITH GRATITUDE

It is with a deep sense of gratitude that we thank our Board and committee members for dedicating the last year to this journey. The dedication and affirmation we have felt from all of you has motivated us to dig deeper, and do more. We thank Farad Ali, Tucker Bartlett, Dianne Birch, Anita Brown-Graham, Sheldon Fox, Mark Kuhn, Easter Maynard, Pat Nathan, Larry Rocamora, Michael Schoenfeld, James Speed, Jr., James Stewart, Carol Tresolini, Timothy Trost, Kathryn Williams, and Phail Wynn, Jr.

We are grateful for our professional staff. This family of individuals has grown, changed, and collaborated more intentionally during this process than ever before, and we are ready to continue on this path together, passionately working for the good of the community.

Finally, we'd like to thank Meredith Emmett of ThirdSpace Studio for her facilitation and guidance in this strategic visioning process. We'd also like to thank Gita Gulati-Partee, Graig Meyer, Sterling Brown, and Kathleen Crabbs with OpenSource Leadership Strategies for their training and coaching as we explored our understanding and value for equity in philanthropy.

**THANK  
YOU**



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**#VibrantTriangle**

Founded in 1983, Triangle Community Foundation has always been committed to creating a vibrant, thriving Triangle region in North Carolina.



Confirmed in Compliance with National Standards for U.S. Community Foundations.

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