



TRIANGLE
COMMUNITY
FOUNDATION

MAKING MORE POSSIBLE

2025-2029

STRATEGIC PLAN



In 2023 Triangle Community Foundation celebrated our 40th anniversary, which offered us the opportunity to acknowledge our past achievements and begin planning for the future. We gathered with many of our constituents during the year and listened to your thoughts about what we have accomplished so far and what you want to see from the Foundation as we plot out the next decade of operations.

One thing we consistently heard in our conversations was that we needed to be bolder in order to make a bigger impact on our community, and figure out a way to no longer be “the best kept secret” in the Triangle. We are pleased to say that we listened, and with this new strategic plan we are planning to do just that! As we strive for the Foundation to more accurately reflect the community around us, we have also added curiosity as a value – listening and learning are always the first steps we take in approaching our work.

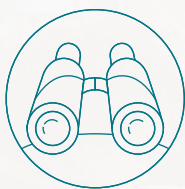
Our ultimate goal is to mobilize more philanthropic dollars in the Triangle to solve our region’s most pressing issues alongside our nonprofit and community partners. We plan to use our strengths in collective giving, collaboration, and connection to provide more innovative products for fundholders, and address one of the most challenging issues currently facing our region: housing affordability.

Just as the Triangle community has evolved and continues to, so must we. Our strategic priorities are intentional, with increased growth in the Foundation leading to increased investment in the community. We will continue grantmaking, philanthropic services, community engagement, and convening, but expect to see more innovative ways to receive, deploy, and invest assets.

We are excited to enter this new phase with the Foundation, and thank you for joining us on this next journey.

LORI O'KEEFE
President & CEO

REBECCA BALTER, PH.D.
Board Chair



OUR MISSION

We inspire and mobilize giving, leadership, and action.



OUR VISION

A vibrant Triangle that works together to ensure everyone thrives.

OUR VALUES

Our five values are the core principles and ethical standards that guide the Foundation's behavior, decision-making process, and culture.

Community	It takes all of us to change the region. We call the Triangle home and honor the diverse strengths, needs, voices, and backgrounds of all people who live here, encouraging collaboration, collective giving, and a sense of belonging for positive change.
Equity	We use our resources, expertise, influence, and privilege to partner with communities in need. We desire for all living in the Triangle to participate, prosper, and reach their full potential, and we work collaboratively to create equitable opportunities for all people in our region.
Legacy	What we do today impacts tomorrow. We are committed to cultivating long-term relationships with all our partners. We honor the gifts left by visionary and forward-thinking donors and encourage multi-generational giving.
Curiosity	We are curious about people and solutions that work. We listen and learn from people with lived experience and research trends before proposing solutions or deploying resources.
Leadership	We are the Triangle's philanthropy engine. Deeply ingrained in the Triangle's nonprofit and philanthropic landscape since 1983, we embrace our role as convener and connector to mobilize impactful giving for our region.

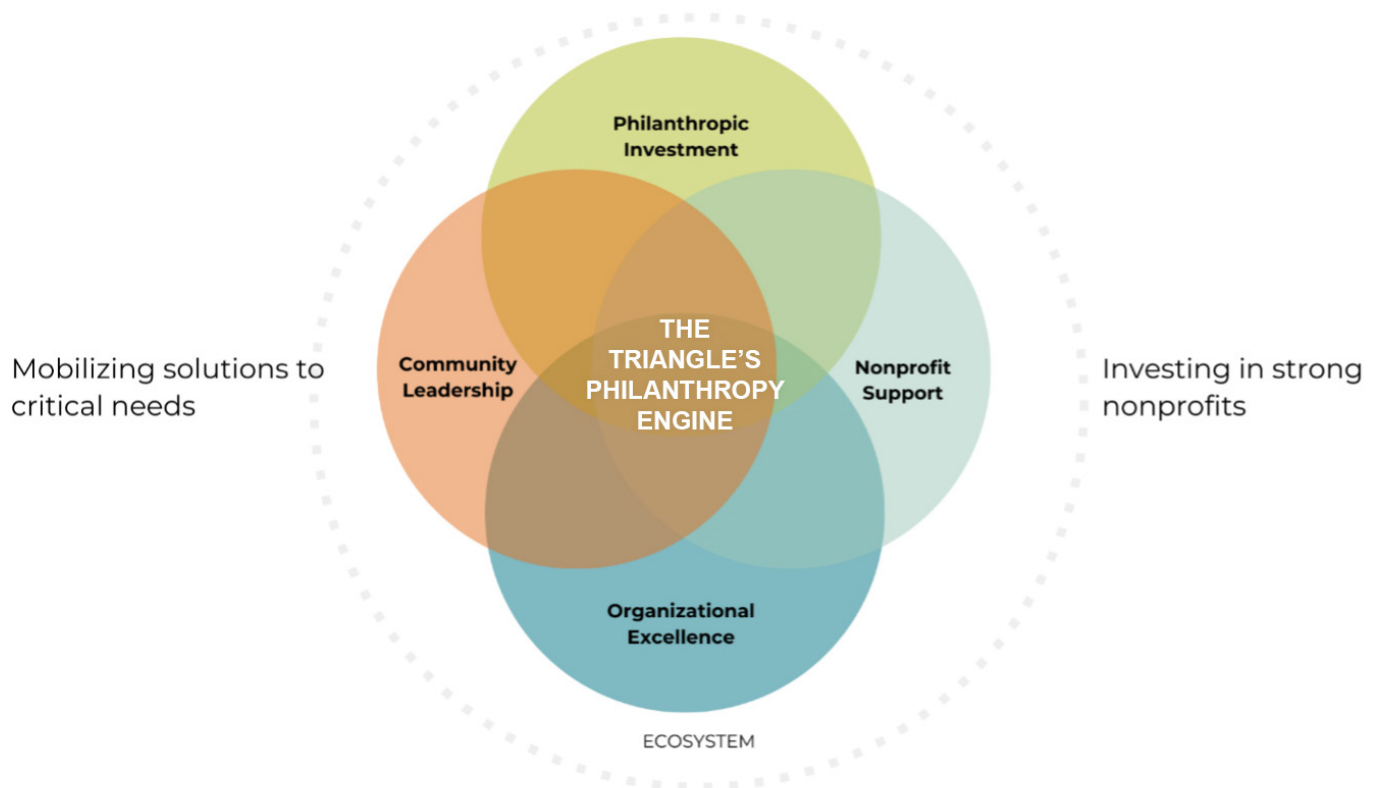
FRAMEWORK FOR GROWTH

At Triangle Community Foundation, we work tirelessly to increase awareness, engagement, and investment in strong nonprofits and solutions positively impacting the Triangle region.

BECOMING THE TRIANGLE'S PHILANTHROPY ENGINE

After four decades, we have the knowledge, resources, and networks to impact positive change in our region. Our leadership model is characterized by philanthropy expertise, data and research, and connections. By focusing on four intersecting strategic priority areas, we will continue to cultivate a culture of philanthropy in our region with the Foundation at the center.

Building a culture of philanthropy in the Triangle



Building organizational capacity, culture and sustainability

PHILANTHROPIC INVESTMENT

Build a culture of philanthropy in the Triangle region that leads to more people investing their time, talents, and treasure.

WHY IT'S IMPORTANT

With our region growing rapidly, it is important to ensure that growth doesn't leave anyone behind.

HOW WE'LL DO IT

- ▶ Create and strengthen partnerships that expand growth, with specific focus on professional advisors, business owners, next generation successors, and underrepresented as well as legacy donors.
- ▶ Guide donors through community-centered, data-informed stewardship to increase and influence local grantmaking.
- ▶ Provide multiple flexible-giving vehicles and fee-for-service product options that unlock collective and innovative giving.

WHAT SUCCESS LOOKS LIKE

- ▶ Double annual giving and investment in the Triangle region.
- ▶ Offer more and innovative ways to give.
- ▶ Fundholders more accurately represent the Triangle region.



Photo courtesy of Chatham Arts Council, 2023

COMMUNITY LEADERSHIP

Broaden awareness of and mobilize solutions to critical needs and challenges facing the Triangle.

WHY IT'S IMPORTANT

The Triangle is a great place to live and work, but we can always do more to make it better. One of the Foundation's greatest strengths is our ability to convene those who are closest to challenging issues with those who have the resources and expertise to make a difference.

HOW WE'LL DO IT

- ▶ Intentionally focus on helping the community better understand the work we do and cultivate our partnerships to create a more thriving region.
- ▶ Take a stand on and mobilize resources for particularly challenging issues in the Triangle.
- ▶ Use our strength in convening and engaging stakeholders to provide opportunities for education, connection, and collaborative efforts to address community challenges.

WHAT SUCCESS LOOKS LIKE

- ▶ Invest in promising solutions and convene stakeholders to coordinate giving.
- ▶ Work with local partners to provide meaningful ways of understanding the impact of investments in the Triangle.
- ▶ More community members across the region recognize the Foundation as a trusted philanthropic leader in the Triangle.

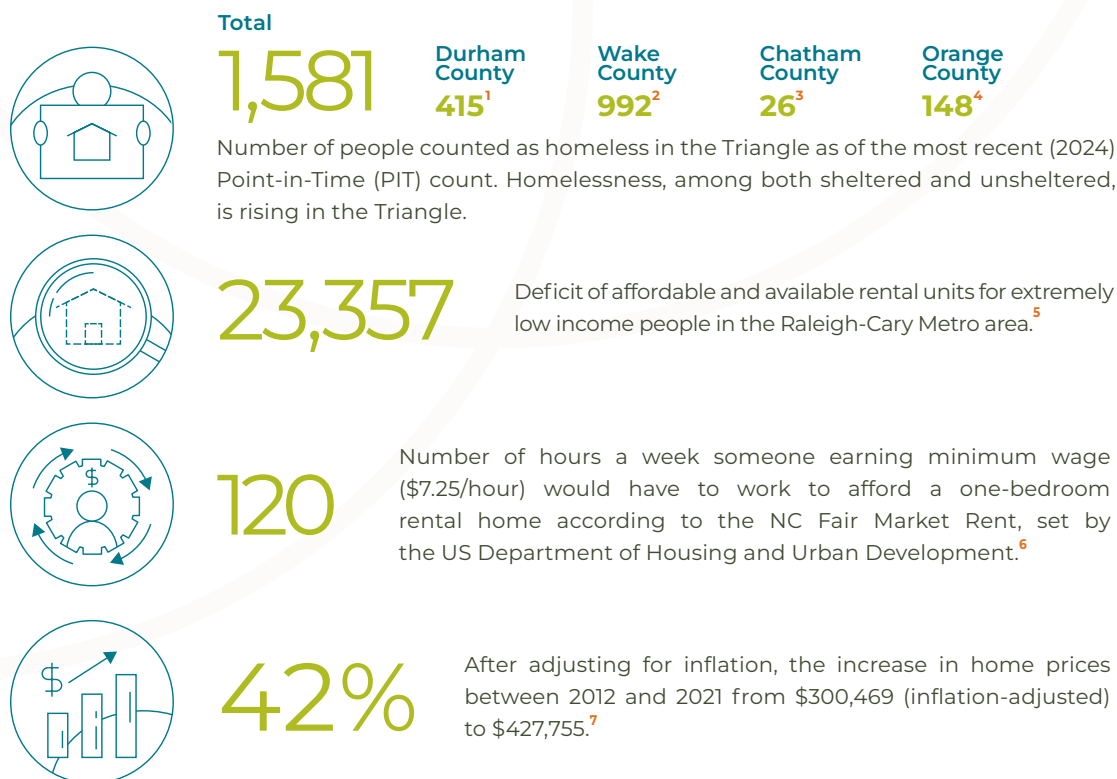


COMMUNITY LEADERSHIP IN ACTION HOUSING AFFORDABILITY

Having heard a desire from our stakeholders to be bold and take a stand on issues to maximize our impact and fully utilize our role as a convener and community leader, we have identified housing affordability as a key issue in our region and one in which a community foundation is uniquely suited to support with grantmaking, impact investing, advocacy, convening, and more.

As we take this step into community leadership on housing affordability, we will be intentional in listening, learning, and understanding where we can best utilize our unique assets, skills, and relationships to address issues across the housing affordability spectrum. We will partner with strong nonprofits, fellow funders, and others who bring expertise and complementary resources, and strategically deploy assets in support of key issues.

Everyone deserves a stable place to call home in a neighborhood that is safe and close to where they work, go to school, or find community, and yet for many in our community that reality is out of reach:



THE HOUSING CONTINUUM



NONPROFIT SUPPORT

Invest in strong nonprofits that are addressing critical needs and enriching the lives of Triangle residents.

WHY IT'S IMPORTANT

Strong nonprofits come in all shapes and sizes and should be able to focus on doing the work of supporting the community with the understanding they have the capacity and resources to sustain their operations.

HOW WE'LL DO IT

- ▶ Continue discretionary investments through grants and other tools to support the Foundation's impact areas.
- ▶ Engage with funder partnerships like Triangle Capacity-Building Network.
- ▶ Refer nonprofits to effective service providers to address capacity-building needs of the nonprofit sector.

WHAT SUCCESS LOOKS LIKE

- ▶ Increase the percentage of our grants that fund Triangle nonprofits.
- ▶ Leverage the Foundation's resources to connect nonprofits with learning and convening opportunities.
- ▶ Adopt criteria to assess nonprofits' impact and health.



ORGANIZATIONAL EXCELLENCE

Build the organization's ongoing capacity, culture, leadership, and sustainability.

WHY IT'S IMPORTANT

To bring the philanthropy engine to life, it is vital to have a dynamic team that is thriving in their own right.

HOW WE'LL DO IT

- ▶ Provide funding and time for professional development, upskilling, and team building to continue to build the strongest team able to do the work necessary to grow philanthropy in our region.
- ▶ Build a culture of succession planning, knowledge transfer, and cross-training to build cohesion and staff longevity.
- ▶ Consistently engage with staff to evaluate satisfaction and identify areas of improvement.

WHAT SUCCESS LOOKS LIKE

- ▶ Build upon our existing high-performing team, as measured by retention, engagement, and enjoyment with working at the Foundation.
- ▶ Identify and invest in future leaders of the Foundation.



Staff Retreat, 2024

WON'T YOU JOIN US?

We are excited at the path ahead, but recognize we can't do it alone – we need your help.

Here are just a few suggestions to get involved:

- ▶ Participate in an upcoming event or learning opportunity.
- ▶ Open a fund.
- ▶ Donate to Fund for the Triangle, our flexible fund that offers grants to nonprofits in our impact areas.

There are so many other ways we can help with your philanthropy and our community. Give us a call at (919) 474-8370 or email us at information@trianglecf.org to learn more.

Let's work together to ensure the Triangle region is fueled to make more possible!



LEARN MORE



ACKNOWLEDGEMENTS

We would like to thank the following individuals for their work in putting this strategic plan together:

Foundation Board of Directors

Caroline Abbott, Elizabeth Arias, Rebecca Balter, Creighton Blackwell, Matt Bullard, Kevin Dick, Crystal German, Rick Guirlinger, Lilyn Hester, Bernard Hsu, LaToya Montague, Wayne Morgan, Renee Paschal, Hilary Pollan, Evan Raleigh, Pilar Rocha-Goldberg, Vijay Shah, Laura Virkler, Stelfanie Williams

Branding Committee Volunteers

Rebecca Balter, Jean Gordon Carter, Meredith Emmett, Ryan Fehrman, Crystal German, Bernard Hsu, Carly Jones, Hilary Pollan, Denise Rowson, Vijay Shah, Jeanne Tedrow, Erandi Villa

Strategic Plan Focus Group

Millie Brobston, Jean Gordon Carter, Tych Cowdin, Jeff Crane, David Dodson, Bernard Hsu, Jesalyn Keziah, Virginia Lee, Cécile Noël, Val Stewart, Sandy Sweitzer, Jeanne Tedrow, Jerry VanSant, Shannon Walters, Lizette Cruz Watko

And a special thank you to our consultant The Giving Practice, our strategic planning committee chair Ravila Gupta, our dedicated staff, and former Board members for their input.

SOURCES

1. https://www.durhamnc.gov/DocumentCenter/View/56107/2024_PITHIC_Report
 2. <https://wakenc507.org/point-in-time-count-2024/>
 3. <https://www.ncceh.org/datacenter/pitdata/>
 4. https://www.ocpehnc.com/_files/ugd/52554b_5b54cc9319bc40d08ffc5616366b2bf9.pdf
 5. <https://nlihc.org/gap/state/NC>
 6. <https://nlihc.org/poor/state/nc>
 7. <https://carolinademography.cpc.unc.edu/2022/03/16/affordable-housing-in-wake-county-nc/#:~:text=Home%20prices%20rising%20across%20Wake%20County&text=Both%20average%20and%20median%20prices,and%20not%20adjusted%20for%20inflation>
-



PO Box 12729 Durham, NC 27709
800 Park Offices Dr, Suite 201,
Research Triangle Park, NC 27709
trianglecf.org