



WINTHROP

ROCKEFELLER

FOUNDATION

**Strategic Plan
2008 – 2013**

Introduction

Background

For more than three decades, WRF has been described as the “beloved” Foundation of Arkansas. We have awarded \$121 million to groups, organizations and agencies to improve the lives of Arkansans. We play a crucial role in supporting community and economic development, contributing to advocacy and public policy that has benefited all Arkansans and assisting in the creation of dozens of nonprofit organizations that serve Arkansans. WRF has been a leading voice for foundation accountability and transparency, and a strong advocate for foundation support of marginalized communities. The organization plays an important role in Arkansas’ philanthropic sector and has a rich history.

Appendix B shows WRF’s contributions through grantmaking to improving the lives of Arkansans in the past five years. The Foundation has made investments in education, economic development and race and social justice in ways that have leveraged additional dollars and relationships with local and national funders and local and state governments. WRF’s grants have resulted in positive impact on early childhood education, post-secondary education, STEM, financial literacy, entrepreneurship, and more. We have influenced public policy through our foundation supported research and support of policy advocacy. Building on our investments, WRF will focus its resources to maximize impact, leverage and influence.

Beginning with the hire of a new CEO, WRF is engaged in the development of a five-year strategic focus plan for the Foundation to support the Moving the Needle (MTN) vision – reducing poverty through economic growth and educational advancement. This planning process involves three phases:

- **Field Analysis:** To effectively scan WRF’s internal and external environment, WRF works with several consultants:
 - Mobilizing Communities is visiting communities around the state, providing a database of community change initiatives. MC is engaging a design team of Arkansans with experience in working in rural and urban communities throughout the state.
 - Glenn Nishimura is looking at how to sustain change in two small Delta communities by working with their local community development corporations.
 - Frontline Solutions is examining economic, racial and social justice work occurring throughout the state.
 - Felipe Floresca is focusing on promoting MTN through public policy.

Additionally, individual conference calls and meetings were held with WRF board of directors, and well over 100 stakeholders throughout Arkansas. Staff convened three consultative sessions with current and former grantees, funders, policymakers and “friends” of the foundation. All of the meetings, conference calls and convenings provided ideas and feedback, and built understanding of what the MTN vision might look like.

- **Board Briefing:** The WRF Board held a briefing in March 2008. At the briefing, the board reviewed the CEO's proposed strategy to support MTN, discussed the implications of those strategies, and instructed staff to come back to the June 2008 meeting with a strategic plan to support the vision.
- **Draft Plan Development:** Following the board briefing, the CEO talked with most members of the board about the plan and staff held a retreat to develop the strategic plan.

Summary of Goals

Over the next five years, from June 2008 through March 2013, WRF will build on its thirty five-year track record as the state's premier Foundation and bring the organization to a new level of effectiveness and impact through MTN. **WRF works to improve the lives of all Arkansas in three interrelated areas of economic, racial and social justice; economic development; and education. WRF will focus this work on people and communities with the least wealth and opportunity. WRF will be held accountable to the highest standards of integrity and openness. As a Foundation, WRF will use its resources to understand the problems contributing to poverty in Arkansas and develop a long-term action plan to address the underlying issues. This requires us to focus on a few goals and, ideally in collaboration with other public and private funders, devote resources to a mix of research, advocacy and direct services.**

The organization has adopted four programmatic goals:

- 1) WRF's first goal is to see **a reduction in the number of AR families living below 200% of the federal poverty line.** This includes funding policy advocacy, workforce development, financial literacy and asset development.
- 2) WRF's second goal is to see **an increase in high school, vocational education and college graduation rates in the state.** This includes funding initiatives that create a culture of high aspiration and educational achievement, and reduce the achievement gap, drop out rates and levels of post secondary remediation.
- 3) WRF's third goal is to see **select communities in AR reduce poverty locally by engaging in local community change efforts.** This includes increasing funding for civic engagement, policy advocacy, and community organizing with and on behalf of people and communities with the least wealth and opportunity.
- 4) WRF's practice (fourth) goal is to see that the Foundation **employs good grantmaking practices that most effectively help nonprofits achieve our MTN goals and their missions.** This includes considering general operating support, providing multi-year funding commitments and other recognized best practices that improve the sustainability and effectiveness of grantees.

In order to achieve these programmatic goals, WRF has adopted the following goals for the functioning of the organization:

Programs: WRF effectively engages in grantmaking that supports the achievement of its mission and MTN programmatic goals.

Communications: WRF is positioned as the leading AR expert on and advocate for MTN and philanthropy at its best.

Impact Measurement: WRF effectively measures the impact of its work.

Governance: WRF has a Board of Directors that is strong, effective and supports the achievement of WRF's mission.

Staffing & Management: WRF has the human resources and internal capacity needed to effectively achieve its programmatic goals.

Finance & Budget: WRF generates sufficient revenue to achieve its programmatic objectives and maintains good stewardship of its financial resources.

The remainder of this document provides detailed objectives and strategies designed to achieve these goals.

Mission and Vision

Mission:

WRF's mission is to improve the lives of Arkansans by funding programs, projects, operating support and direct services that improve education; economic development; and economic, racial and social justice.

Vision:

WRF's vision statement for MTN is attached.

Programs

A. Background

Based on lessons learned from previous grantmaking, staff wants to build on the momentum of that grantmaking. Moreover, WRF is widely respected for its willingness to speak out on issues related to reducing poverty through economic growth and educational advancement. To

implement MTN, WRF will focus its grantmaking on the program areas described. WRF will do more to build alliances and work collaboratively with others in the sector.

The Theory of Change in Appendix A details how WRF's activities will lead to the above changes. The following section details the goals, objectives and strategies WRF will use to achieve its three overarching programmatic goals.

B. Goals, Objectives (O) and Strategies (S)

Goal: Move the Needle in the four program objectives.

O₁: Reduce the number of families living below 200% of the federal poverty line.

S₁: Fund policy and advocacy, statewide and local workforce and asset development initiatives, and direct services that show measurable good practices and constructively criticize practices that need to be improved.

S₂: Work with policymakers, business community, funders, nonprofits and other stakeholders to set targets for reducing poverty in Arkansas.

Measurement Questions: Has the advocacy and or research the Foundation supported produced public policy that positively contributes to reducing poverty in Arkansas? Are best practices from WRF grantees that work to address poverty in the state being promoted and shared? Has the state set targets to reduce poverty and use public resources to address targets? Do reports produced align with the programmatic goals and provide evidence toward reducing the number of families living below the poverty line?

O₂: Increase high school, vocational education and college graduation rates in the state.

S₁: Fund initiatives that create a culture of high aspiration and educational achievement.

S₂: Fund initiatives that aim to reduce the achievement gap, dropout rates and levels of post secondary remediation.

S₃: Continue encouraging students, especially students of color, to pursue STEM education and careers.

S₄: Support campaigns with specific goals related to creating a culture of high aspiration and educational achievement in Arkansas.

Measurement Questions: How many students were retained and graduated as a result of WRF funding? How many students pursue STEM education and careers as a result of WRF funding? How many students pursue high school or bachelor degrees as a result of WRF funding? Did we achieve campaign objectives? Did we successfully carry out the campaign plan? Are new key education partners engaged in the WRF campaign plan?

O₃: Increase educational attainment and economic mobility in select communities in AR by supporting local community change efforts.

S₁: Identify potential communities where local change initiatives can be supported.

S₂: Concentrate investments and technical assistance supports in selected demonstration community (or communities) that will show that comprehensive community change can occur over time.

S₃: Highlight the positive impact of civic engagement, advocacy and community organizing in communities across Arkansas and acknowledge the role funding from WRF and other funders play in achieving that impact

S₄: Build public awareness about challenges and solutions in distressed families and communities, with the ultimate goal of increasing Arkansas' willingness to support, contribute to and demand better outcomes for children and families.

Measurement Questions: What are the baseline measurements of the community assets, strengths and opportunities at the beginning of WRF support and how has the community progressed over time against baseline data?

O₄: Increase WRF grantees' effectiveness with achieving the goals of MTN.

S₁: Build grantees' capacity to operate program/projects effectively which may also include core support for items such as rent, utilities, salaries, and support for technical assistance to implement MTN.

Measurement Questions: Has WRF increased the proportion of direct service and organizational development technical assistance provided to critical grantees? Do grantees report increased levels of efficiency and effectiveness related to WRF support? Are increased efficiencies evident in programmatic outcomes?