



MARY LYON
Foundation
Learn • Succeed • Thrive

A FIVE-YEAR VISION

For Students, Families, Educators, and Communities in Western Massachusetts

Mary Lyon Foundation Strategic Plan | 2026–2031

Over the next five years, the Mary Lyon Foundation will strengthen communities in Western Massachusetts by investing in students, supporting families, and building partnerships that create lasting opportunities.



A VISION FOR THE FUTURE

The Mary Lyon Foundation exists because every child deserves the opportunity to learn, grow, and thrive.

Following the successful completion of our \$5 million fundraising campaign, we took time to reflect on where we've been and where we're headed next.

Our Board of Trustees, staff, community leaders, and stakeholders developed a five-year strategic plan that will guide our work through 2031.

This plan is more than a roadmap. It is our commitment to expanding opportunity, strengthening partnerships, and creating lasting impact for students and families across our community.



MISSION

To empower students and their families by advocating for community investment in programs and services.



VISION

For all students to have the resources to be ready to learn, to succeed in school, and to thrive in the wider world.

OUR VALUES

EMPOWERMENT

Helping individuals discover opportunities and reach their full potential.

EMPATHY

Listening, understanding, and responding with compassion.

COLLABORATION

Working together to create greater impact than we could alone.

INTEGRITY

Building trust through honesty, accountability, and transparency.

COMMUNITY

Strengthening the places where families live, learn, and grow.

DIVERSITY

Valuing everyone and creating opportunities for all.

Everything we do is guided by six core values that shape our decisions, partnerships, and commitment to the communities we serve.



OUR FIVE STRATEGIC PRIORITIES

Over the next five years, our work will focus on five strategic priorities designed to strengthen the Foundation and expand our impact throughout the region.

EDUCATION & PROGRAMMING

Investing in innovative programs, educator support, and wraparound services that help students and families succeed.

DEVELOPMENT/FUNDRAISING INITIATIVE

Growing philanthropic support and building long-term resources that allow the Foundation to respond to community needs today and into the future.



EXTERNAL AND CHARITABLE INITIATIVES

Expanding partnerships, advocacy, and collaborative initiatives that improve quality of life across our rural communities.

FINANCIAL GOALS

Ensuring responsible financial management so every dollar entrusted to the Foundation creates lasting impact.

INTERNAL RESOURCES

Investing in our people, technology, governance, and organizational capacity to strengthen the Foundation for generations to come.



PUTTING OUR PRIORITIES INTO ACTION

Our strategic priorities translate into meaningful action across the communities we serve.



EDUCATION & PROGRAMMING

- **Build the Educator Assistance Endowment to \$300,000 or greater** to preserve and self-fund the educator mini-grant program.
- **Strengthen public relations** around programs.
- **Augment wraparound services** to expand assistance to **families, students, and educators in need.**



DEVELOPMENT/FUNDRAISING INITIATIVE

- **Prioritize unrestricted revenue streams** to be used where they are needed most, and create annual unrestricted revenue streams to support the operations of the Foundation. Unrestricted revenue streams will enable the Foundation to **grow and meet the increasing needs** while fostering trust and reliability in the community.
- **Pursue public and private mission-related grants** through local, regional, state, and federal sources.
- **Cultivate and deepen relationships** throughout the Commonwealth and nationally to allow for continuity in donor giving and to **strengthen prospects for collaborations and partnerships.**



EXTERNAL AND CHARITABLE INITIATIVES

- **Strengthen legislative advocacy** for rural education and the Foundation.
- **Build upon and expand our strategic partnerships** for maximum community impact.
- **Expand community-based facilities and shared-use programming.**
- **Elevate the Foundation's community profile** with pre-existing and new development networks.
- **Launch a collaborative philanthropic initiative** with mission-aligned partners.

Each initiative is designed to ensure more students, families, and educators have access to the resources they need to succeed.

PUTTING OUR PRIORITIES INTO ACTION

A strong organization allows us to better serve our community.



FINANCIAL GOALS

- **Increase the Foundation's operational efficiency** by further streamlining financial processes.
- **Manage, with the Development team, an unrestricted revenue stream** to support the operations of the Foundation by creating fiscal and budgetary flexibility to advance the mission.
- **Develop and monitor investment strategies** to manage and strengthen our financial position.
- **Research and manage other forms of unrestricted revenue.**



INTERNAL RESOURCES

- **Attract, support, and retain strong leadership talent**, fostering appreciation, and a shared commitment to our mission. The Foundation's continued success increases the need for board and staff talent. Providing resources to attract, retain, and recruit talent ensures continuity for the organization.
- **Strengthen board governance structures** to build organizational resilience. Robust governance structures serve to fortify and protect the organization through all types of internal and external challenges. Integrating new board members, planning for board leadership succession, expanding programming and services, and weathering varying economic cycles and market fluctuations.
- **Build board capacity for generative thinking and shaping long-term strategic direction.** The Foundation has grown and matured over the last five years, and working strategically to align with long-term goals will be important.
- **Invest the time, money, and resources needed to upgrade the Foundation's infrastructure and processes with new technologies** (e.g., hardware, software, AI assistants, IT support, etc.). This can save the Foundation operational costs and reduce burdens on the staff, allowing more time for families/clients and donors.

Together, these efforts create the stability needed to maximize community impact for years to come.

MEASURING SUCCESS

Our strategic plan includes ambitious yet achievable goals that will guide our progress through 2031.

KEY OUTCOMES



\$300,000+

Educator Assistance
Endowment



\$500,000

Annual unrestricted
fundraising goal



20%

Annual donor growth



30%

Increase in charitable
giving over five years

Expanded Partnerships

Working alongside schools, nonprofits, businesses, government agencies, and community organizations to address the evolving needs of students and families.

OUR STORY IN ACTION

Every goal in this strategic plan is rooted in people. Behind every partnership, program, and investment is a student, a family, or an educator whose life has been strengthened through the support of the Mary Lyon Foundation.

“ This support from the Mary Lyon Foundation truly means the world to us, especially during this time of year. It’s a huge help and will undoubtedly bring so much joy and excitement to him. Your program’s generosity makes a significant difference in the lives of many, and we deeply appreciate everything you and the Foundation do for families in our community.

— Parent



LOOKING AHEAD

EVERY STUDENT

deserves the opportunity to succeed.

EVERY FAMILY

deserves access to resources that strengthen their future.

EVERY EDUCATOR

deserves the support and resources to help students learn, succeed, and thrive.

EVERY COMMUNITY

benefits when we invest in education, collaboration, and opportunity.

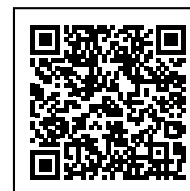
Our 2026–2031 Strategic Plan represents a shared commitment to creating lasting impact through strong partnerships, responsible stewardship, and innovative programs that support students and families across our region.

Together, we are building stronger communities—one student, one family, one educator, and one opportunity at a time.

Contribute to Our
Mission Today



Scan to View the
Complete 2026–2031
Strategic Plan



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