

Mary Lyon Foundation Strategic Plan

Fall 2026 – Summer 2031



From Spring 2025 to Spring 2026, the Mary Lyon Foundation developed a new strategic plan to guide the organization over the next five years. This followed the successful \$5 million fundraising campaign, which resulted in new relationships and achievements the board and staff sought to leverage and build upon for the organization's long-term future. This strategic plan was developed through many deep, inquiring, and meaningful conversations among the Board of Trustees, the CEO, and other staff members, as well as several dedicated community stakeholders who served on the committees that developed the plan for each of the five initiatives below.

It is the hope of the Board and Staff of the Mary Lyon Foundation that this plan will serve as a roadmap for our work and engender further support for the organization, allowing it to fully meet its mission for families in our community in the coming years.

This plan is organized into five strategic initiatives: 1) Internal Resources, 2) Development / Fundraising Initiatives, 3) Financial Goals, 4) External and Charitable Initiatives, and 5) Education and Programming.

Mission: The Foundation's mission is to empower students and their families by advocating for community investment in programs and services.

Vision: The Foundation's vision is for all students to have the resources they need to be ready to learn, succeed in school, and thrive in the wider world.

Values: Empowerment, Empathy, Collaboration, Integrity, Community, and Diversity inform every decision we make, ensuring our organizational priorities align with these principles and foster trust and inclusivity.

1) Education & Programming: Education and programming are at the core of the Mary Lyon Foundation's mission. As school districts in rural areas face steep budget cuts, and families face an ever-growing economic crisis, the Foundation needs to tell its story about how its programming has helped alleviate extraordinary challenges both inside and outside schools.

Goal 1: Build the Educator Assistance Endowment to \$300,000 or greater to preserve and self-fund the educator mini-grant program.

- Coordinate a multifaceted marketing/fundraising campaign to raise awareness of the program and the need to build the endowment. **Timeline:** Ongoing

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- Share more educator stories through social media and newsletter publications. **Timeline:** Ongoing
- Develop materials for prospect meetings to help non-educators understand the fund's need. **Timeline:** 2027
- Create an annual fundraiser to support the educator assistance fund. **Timeline:** 2027

Goal 2: Strengthen public relations around programs.

- Create longer videos featuring programs that directly support the community and educators. **Timeline:** 2027-2031
- Create short reels for social media campaigns. **Timeline:** Ongoing
- Collaborate with the districts to share more storytelling. **Timeline:** Ongoing

Goal 3: Augment wraparound services to expand assistance to families, students, and educators in need.

- Provide direct assistance and annual grants to address essential needs. **Timeline:** Ongoing
- Define service programs to nurture children at home. **Timeline:** Ongoing
- Develop co-funded or collaborative grant opportunities to support wraparound services. **Timeline:** 2028

2) Development/Fundraising Initiative: Fundraising is the principal source of income for the Foundation and is at the core of its existence, growth, and sustainability.

Goal 1: 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.

- Track progress in fundraising unrestricted dollars monthly, quarterly, and yearly. **Timeline:** Ongoing
- Look for patterns and trends in giving to create more efficient and effective fundraising plans. **Timeline:** Ongoing
- Create an unrestricted fundraising goal of up to \$500,000 annually. **Timeline:** Ongoing

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- Plan for an annual fundraising event, such as Mary Lyon's birthday party, to begin securing a regular, unrestricted revenue stream that can grow over time. **Timeline:** Summer 2026 (for Feb 2027 event) and ongoing

Goal 2: Pursue public and private mission-related grants through local, regional, state, and federal sources.

- Purchase a software program to research grant opportunities. **Timeline:** 2026
- Create a pipeline and a calendar to track deadlines, award amounts, and reporting requirements. **Timeline:** 2026
- Strive to create pre- and post-relationships with potential grant funders. **Timeline:** Ongoing
- Grow the funding success rate by 10% each year. **Timeline:** Ongoing
- Assess the feasibility of readiness for a national grant. **Timeline:** Ongoing
- Strengthen data collection to support applications. **Timeline:** Ongoing

Goal 3: Cultivate and deepen donor/friend relationships throughout the Commonwealth and nationally to allow for continuity in donor giving and to strengthen prospects for collaborations and partnerships.

- Grow the Foundation's donor pool by 20% yearly. **Timeline:** 2027-2029
- Create a schedule for up to 500 meetings and touchpoints per year, including calls, emails, events, and letters. **Timeline:** 2028 – 2030
- Continually review donor cultivation best practices to ensure the Foundation is maximizing its effectiveness in prospect management. **Timeline:** Ongoing
- Investigate the feasibility of integrating a new CRM and financial system. **Timeline:** 2029 - 2030
- Hire a full-time seasoned Director of Development. **Timeline:** 2027-2028.

3) External and Charitable Initiatives: As the Foundation grows its advocacy and programming, we look to increase awareness of the challenges rural communities face by building partnerships, advancing advocacy, and sharing our expertise and education. We must spend the next five years developing long-term partnerships to ensure our sustainability and effectiveness.

Goal 1: Strengthen legislative advocacy for rural education and the Foundation.

- Build and maintain active working relationships with state representatives and senators serving the Foundation's service area. **Timeline:** Ongoing

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- Host or participate in at least two legislative briefings or site visits annually focused on rural education challenges and outcomes. **Timeline:** 2029-2030
- Contribute and help advance at least two legislative or budgetary actions that directly benefit rural school districts. **Timeline:** 2028-2030

Goal 2: Build upon and expand our strategic partnerships for maximum community impact.

- Establish 5 to 6 formal partnerships with organizations such as GCC, Five Colleges, food security providers, housing support agencies, and selected for-profit entities in Franklin County. **Timeline:** Ongoing
- Develop clear partnership criteria, a memorandum of understanding between partner agencies, and outcomes with annual evaluation of impact. **Timeline:** 2028-2030
- Launch at least one collaborative initiative annually to address community needs, such as education, childcare, food security, or workforce support. **Timeline:** Ongoing

Goal 3: Expand community-based facilities and shared-use programming.

- Complete a feasibility and partnership study for expanded or shared-use facilities. **Timeline:** 2028-2029
- Expand integrated programming to help solidify interagency partnerships. **Timeline:** Ongoing
- Secure at least one co-located or shared facility arrangement with mission-aligned partners (e.g., childcare, senior services, health, or education). **Timeline:** 2028-2030
- Increase the Foundation's capacity to host programs, events, and partner-led services by at least 20%. **Timeline:** 2029

Goal 4: Elevate the Foundation's community profile with pre-existing and new development networks.

- Expand local and national business partnerships by 25% to increase visibility and charitable giving. **Timeline:** 2030-2031
- Strengthen relationships with all municipalities and regional entities in the service area by actively partnering and participating in joint initiatives. **Timeline:** Ongoing

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- Demonstrate increased visibility through measurable growth in community engagement, such as event participation, cross-sector initiatives, or public recognition. **Timeline:** 2027-2031

Goal 5: Launch a collaborative philanthropic initiative with mission-aligned partners.

- Create a formal initiative to support other nonprofits by 2030, including capacity-building grants, shared services, or programmatic partnerships. **Timeline:** 2029-2031
- Engage at least five non-profit partners over five years through pooled funding, shared programming, or joint evaluation. **Timeline:** 2029-2031
- Demonstrate increased reach or effectiveness through annual impact reporting and partner feedback. **Timeline:** Ongoing
- Increase total charitable giving by at least 30% over five years, with funding distributed across multiple categories of need. **Timeline:** 2031
- Evaluate outcomes annually to ensure charitable investments measurably improve access, participation, and student/family stability. **Timeline:** Ongoing
- Establish data collection measures and improved infrastructure to achieve measurable outcomes. **Timeline:** 2028-2029

4) Financial Goals: Through thorough financial oversight and analysis, the Foundation’s financial performance is excellent. As we look toward the next five years, the finance department will continue to streamline processes and explore strategies to improve our financial sustainability and further growth.

Goal 1: Increase the Foundation’s operational efficiency by further streamlining financial processes:

- Create projections for multi-year cash flow models to continue tracking fiscal trends. **Timeline:** 2027-2029
- Continue documenting current financial procedures and update training manuals to meet best practices. **Timeline:** Ongoing
- Work with the CPA team to advance stewardship of its fiscal resources. **Timeline:** Ongoing
- Invest in current software and accounting technology that promotes greater financial efficiency and integrates with fundraising software. **Timeline:** 2028
- Continue staff training for cybersecurity and safety. **Timeline:** Ongoing

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Goal 2: 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.

- Support grant opportunities that would benefit the Foundation. **Timeline:** Ongoing
- Support more business donor potential. **Timeline:** Ongoing
- Emphasize fundraising efforts to support unrestricted revenue. **Timeline:** Ongoing
- Ensure that the Foundation has a reserve available to address unexpected or emergent cash needs. **Timeline:** Ongoing

Goal 3: Develop and monitor investment strategies to manage and strengthen our financial position.

- Continue periodic reviews of current investments and alternatives that meet long-term industry standards. **Timeline:** Ongoing
- Examine, review, and update investment policies annually that enhance management of fiscal resources entrusted to the care of the Foundation. **Timeline:** Ongoing
- Continue stewardship practices, including annual reviews of all scholarships, to achieve fund objectives. **Timeline:** Ongoing

Goal 4: Research and manage other forms of unrestricted revenue.

- Support potential community financial collaborations. **Timeline:** 2027
- Develop a model of fiscal coordination for local social services. **Timeline:** 2028-2029
- Enable shared business service arrangements. **Timeline:** 2028
- Examine and assess consulting and technical services. **Timeline:** Ongoing

5) Internal Resources: The Mary Lyon Foundation recognizes the importance of building and strengthening our internal resources to support staff development and ensure organizational sustainability, and of clearly communicating these efforts to stakeholders to foster trust and shared purpose.

Goal 1: 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.

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- Identify and acquire the internal and external resources needed and provide professional development and training opportunities (both locally and nationally) to retain talent. **Timeline:** Ongoing
- Create a plan that addresses long-term succession management and leadership continuity for key positions, such as the CEO and the Chair of the Board. **Timeline:** Ongoing
- Create Risk management plans to support leadership in the event of a sudden departure from key positions on the board and/or staff. **Timeline:** 2027-2029
- Ensure that annual performance review processes optimize professional growth for the CEO, staff, and Board of Trustees. **Timeline:** 2026-2027
- Create a staff appreciation plan to be executed by the Board of Trustees. Consider annual appreciation and performance-based pay incentives. **Timeline:** 2027 - 2028
- Develop structures to continue to cultivate a strong CEO/Board relationship. **Timeline:** Ongoing
- Evaluate ways in which the Foundation can continue to be intentional in its culture, equity, and inclusion work, building trust in collaboration with the community. Continually evolving our communication plans to speak to all audiences. **Timeline:** Ongoing

Goal 2: 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.

- Identify gaps in required skills to inform board recruitment, while allowing for flexibility in expertise and geography. **Timeline:** Ongoing
- Create board recruitment guidelines with board eligibility requirements. **Timeline:** 2027-2028
- Evaluate and work toward an optimal board size. **Timeline:** 2028-2029
- Update the bylaws relative to term limits. **Timeline:** 2026
- Create a succession plan for officers and committee chairs. **Timeline:** 2027-2028
- Develop a risk management plan to address financial, operational, and reputational risks and disruptions. **Timeline:** 2028-2029
- Create a crisis management plan for both internal and external exposure. **Timeline:** 2027-2029

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Goal 3: 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 in board education and training to elevate strategic versus operational focus. This may include establishing a board development program and/or developing leadership training for board chairs. **Timeline:** Ongoing
- Establish a vehicle for annual board evaluation, set up a process, analyze, and share results. **Timeline:** 2027
- Institute protocols and standards for communication between the CEO and the board. This may include cadence, topics, and other essential metrics to ensure a strong working relationship. **Timeline:** 2027-2028
- Continue to create an equitable and inclusive board culture that values trust and communication. Seek out opportunities for cooperation that empower trustees to leverage their skills to elevate the Foundation. **Timeline:** Ongoing

Goal 4: 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.

- Create a subcommittee to research current technology and best practices to address the most pressing needs. Explore cost-efficient, integrated software options/upgrades that may be more effective at donor management, accounting, etc. **Timeline:** 2028-2030
- Establish a process to keep the board well informed about Foundation needs and new technologies. **Timeline:** Ongoing
- Empower staff to introduce new technologies and best practices learned from other non-profit organizations. **Timeline:** Ongoing