

STRATEGIC PLAN 2026-2030

Introduction

Following a leadership transition in the middle of 2024, GCRI decided to take a fresh look at the 20-year-old organization's mission, structure and direction. A strategic planning process kicked off in 2025 to reflect on the current context in the philanthropic sector, to hear from members about what they most want and need and to chart a new course for the membership organization's next decade. The key questions we sought to answer included:

- What do members most value/need from GCRI?
- Is there enough of a potential membership base in RI to grow GCRI?
- What is the path to financial sustainability?
- How can we position ourselves to attract greater engagement and more members?
- What could it look like for GCRI to provide greater field leadership?

The political climate in 2025 shifted dramatically, which required that GCRI respond to the moment while also thinking strategically about its future. Some questions about who we become will inevitably be shaped by this current political and financial climate. We have drafted a set of strategic priorities that are intended to set direction, while also leaving room to be responsive to needs and opportunities as they arise.

STRATEGIC PLANNING PROCESS

In early 2025, a strategic planning consultant with expertise in Philanthropy Serving Organizations (PSO's), Nancy Burd, led the board of GCRI in an exploration of the organization's current context: strengths, opportunities, aspirations and intended results. At the same time, we convened a Strategic Planning Committee made up of two board members and two active members who are not on the board.

Nancy Burd then conducted a survey of GCRI members, using questions commonly used in similar organizations and informed by the Strategic Planning Committee. Simultaneously, Nancy Burd and Courtney Bourns conducted eight interviews with peer PSO's in other states and studied the dues structures and business models of roughly a dozen philanthropy serving peers.

HIGHLIGHTS OF MEMBER SURVEY

The member survey that was in the field in March 2025 was completed by 32% of the people who received it. All of them work in GCRI member organizations. We did not survey prospective members for this survey. Survey responses revealed that GCRI members most value the organization for fulfilling the following roles:

- Serve as a convener to connect with peers in philanthropy
- Help individuals and organizations in philanthropy to stay abreast of local trends and issues impacting Rhode Island nonprofits and communities
- Connect members to peer organizations for co-funding opportunities

Overall, GCRI was selected above all others as the primary source for getting the most up to date information on best practices and grantmaking. GCRI was rated equally with others as a recognized expert in philanthropic practice. However, GCRI was not ranked as the go-to source for staying abreast of national trends nor was it considered the most trusted source for forward- thinking and visionary ideas in philanthropy.

WHAT DO MEMBERS WANT?

The survey results revealed five priority areas where members overwhelmingly want to see GCRI focus:

1. Strengthen connections between organizations that provide funding in Rhode Island
2. Create pathways for collaboration between funders who have similar funding interests
3. Keep members up to date on legislative and other issues that may affect philanthropy
4. Be a leadership voice for the field of philanthropy in Rhode Island
5. Grow the philanthropic sector in Rhode Island

The survey combined with insights shared by the GCRI board and strategic planning committee led to the priorities outlined below in the five-year strategic plan.

Grantmakers Council of Rhode Island: a hub of connection and learning for RI's philanthropic sector.

Our New Mission

The Grantmakers Council of Rhode Island (GCRI) is a community of funders committed to increasing and amplifying philanthropy's impact across the Ocean State.

We provide convening, peer-to-peer learning and timely resources so that our members can be effective and coordinated in their grantmaking and philanthropic initiatives across the state.

We...

- Amplify the impact, visibility and voice of philanthropy
- Connect philanthropic leaders and organizations
- Develop capacity through professional development and networking
- Curate national resources for Rhode Island grantmakers
- Foster collaboration across sectors

2026-2030 Strategic Priorities & Goals

GOAL 1: Convene and connect to strengthen our sector and spark collaboration

GCRI will be a hub of connection for RI's philanthropic sector, fostering a culture of relationship-building and learning among grantmakers and strategic partners across the state. In our role as philanthropy's hub in RI, we will facilitate

OBJECTIVE A: Design two annual signature convenings that are well-attended + well-reviewed

Design and host annual signature convenings for the field of philanthropy in Rhode Island to come together for high impact learning and networking. Fall: Annual Meeting and Spring: topical or timely convening

OBJECTIVE B: Facilitate knowledge sharing and learning among GCRI members

Host quarterly convenings or webinars in response to member interest and fieldwide trends where grantmakers in RI can exchange best practices, lessons learned, and innovative approaches. Enable participants to strengthen their practice through learning from one other, outside experts and national colleagues.

OBJECTIVE C: Create pathways for learning and collaboration between funders who have similar funding interests by building and sustaining relationships

GOAL 2: Serve as a trustworthy source for information on local trends and issues impacting philanthropy in Rhode Island

GCRI is a leading source of credible, timely, and actionable information on local trends and issues affecting Rhode Island philanthropy, enabling our members to take action in a responsive way.

“The biggest issue at hand is understanding what the federal changes mean for Rhode Island. Regularly distilling that information down would be very helpful.”

-- GCRI Member

OBJECTIVE 1: Establish GCRI as a leading source in RI for data and analysis on local philanthropic trends, evidenced by increased citations in media, policy discussions, and community planning efforts.

We will position ourselves as a leading source by proactively gathering, analyzing, and sharing data and insights with our members, partners and the broader community. Our role is to translate and curate relevant information and to serve as an expert resource for local media and policymakers.

OBJECTIVE 2: Strengthen GCRI’s Communications & Marketing about the philanthropic sector

We will elevate the story of philanthropy’s impact on the state of Rhode Island.

OBJECTIVE 3: Partner on State of the Sector Report with the Alliance

We will disseminate and create GCRI events around key reports that partners and members produce. (e.g. Economic Progress Institute, Chamber of Commerce, Women’s Fund, Blue Cross Blue Shield of Rhode Island, Kids Count RI)

GOAL 3: Grow and Serve GCRI’s membership

GCRI connects a diverse array of professionals and organizations practicing philanthropy in Rhode Island to strengthen and expand the practice of philanthropic giving, enhance impact, build trust, and promote and nurture collaboration across the sector. The foundation of GCRI is its members.

“Bring grantors, including larger DAF recommenders, into one group working together instead of being siloed. Welcome new funders (new to RI, new to wealth) into the fold and introduce them to being a philanthropist in this state. Welcome regional funders to the state and encourage them to give more here. Deepen, educate and connect our funder pool.”

-- GCRI Member

OBJECTIVE 1: Grow membership

2028 target: 50 members

OBJECTIVE 2: Explore expansion of membership categories

By expanding our network to include grantmaking organizations—such as foundations, corporations, giving circles, donor-advised funds—as well as individual donors, advisors, and consultants, we foster greater inclusivity, encourage collaboration, and strengthen our collective impact.

OBJECTIVE 3: Effectively communicate meaningful benefits

Offer a select set of benefits to members that enhance their practice and make their jobs easier. Skillfully communicate the value proposition of GCRI membership to various audiences within the sector, including both the tangible and intangible benefits of a strong and connected philanthropic sector.

GOAL 4: Financial and organizational sustainability to build resilience

Establish a sustainable business model for GCRI that ensures long-term resilience through diversified revenue and investments in staffing, infrastructure and dynamic communications.

OBJECTIVE 1: Diversify revenue sources

Establish a strategic allocation of diverse income streams, including but not limited to member dues, program grants, operating grants, program fees, fees for service (i.e. project management), and sponsorship.

OBJECTIVE 2: Implement new dues structure

By year three of the plan, GCRI will implement a new business model, standard for PSO's, that relies on a mix of revenue, including membership dues based on grant distribution in the state.

OBJECTIVE 3: Strengthen existing revenue pathways and build long-term funding relationships

Optimize current revenue-generating activities by monetizing conferences, leadership events, and special programs. In years 3-5, consider funder collaborations housed at GCRI as a strategic and financial advantage.

OBJECTIVE 4: Staffing

Build toward a staffing model that includes a fulltime ED and equivalent of additional 1.5 FTE which cover membership, program and/or communications roles.

OBJECTIVE 5: Monitor and adjust

Regularly assess the effectiveness and sustainability of each revenue stream, making adjustments based on performance data and emerging opportunities.

GOAL 5: Governance

Strong board governance of GCRI advances effective philanthropy in Rhode Island. The GCRI board partners with the executive director on strategic leadership, financial sustainability and growth. The GCRI Board is actively engaged in the fundraising and membership goals of the strategic plan.

OBJECTIVE 1: Maintain a Strong Board and Board Pipeline & Establish Key Committees

OBJECTIVE 2: Engage with Existing Members and Recruit New Ones

OBJECTIVE 3: Update By-Laws, Financial Policies and Procedures and Terms of service to support a growing organization.

A New Business Model is Needed

In support of Goal 4 in the strategic plan, a major undertaking of the strategic planning process was the creation of a new business model for GCRI. A new dues structure and three-year budget were developed by the consultant and the executive director, based on the models of leading small PSO's across the country with specific attention to peers in New England.

Based on that research and guidance from the strategic planning committee, the Strategic Planning Committee and the Board endorsed the new draft dues model, with the understanding that it will be fine-tuned with a Membership Task Force in 2026. The Task Force will also advise on how best to socialize the new plan with GCRI membership before rolling out the new dues structure in 2028. Following is an overview of the draft business model.

In the meantime, the executive director and board members will be fundraising to capitalize the growth outlined in the strategic plan and invest in GCRI's capacity to deliver on the plan's program and leadership aspirations. The working hypothesis is that by the end of 2028, when all members are paying the new dues, and GCRI is bringing in revenue through program fees and sponsorship, the organization will have adequate stable operating funds to be self-sustaining, raising additional grant funding only as needed for special projects.