



# **BELOVED COMMUNITY**

## **STRATEGIC PLAN**

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**FY24 - FY28**

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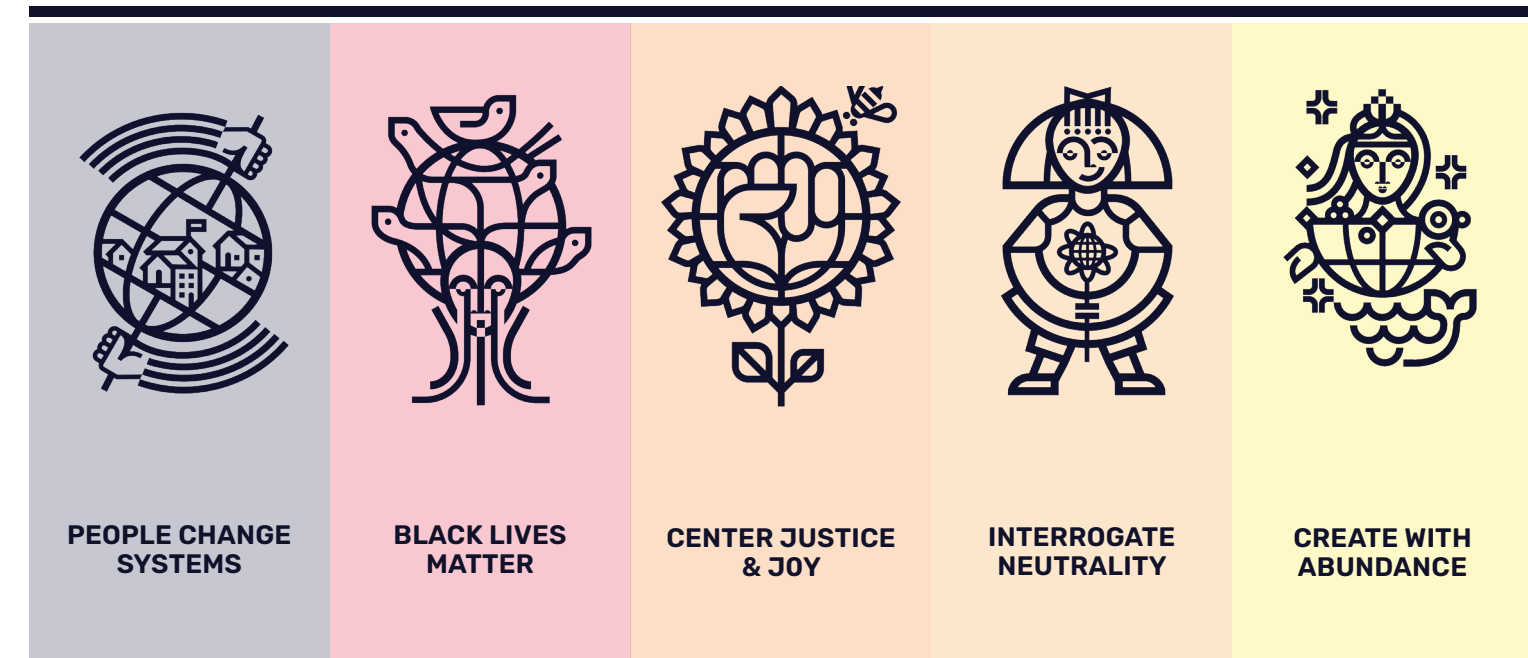
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## MISSION

Our mission is to Build Sustainable Change. We do so by supporting regions to further their collaborative journey for racial and economic equity, and by centering our most marginalized populations as we advance towards the beloved community.

## VALUES



## VISION

Our Vision is The Beloved Community.

Dr. King defined the beloved community as “a global vision in which all people can share in the wealth of the earth - a world where racism and all forms of discrimination, bigotry, and prejudice will be replaced by an all-inclusive spirit of sisterhood and brotherhood.”

When we are practicing the beloved community, we center love for humanity. Love as accountability. Love as justice. Love as community. Love as belonging.





LETTER FROM  
RHONDA

Beloved,

When I was developing my vision for our beloved community, Rev. Dr. Starsky Wilson offered these words of guidance. It’s important to me that we name how we are simultaneously advancing the beloved community and not yet able to fully embody this vision. We are shifting structural paradigms for future generations and learning how to be in community at the same time.

During our first five years we defined foundational building blocks for our work. We’ve developed consulting and communities of practice, a rich data and community-engaged research team, and Awa, a software platform for our assessment tools. In alignment with our belief about proximity to power, we have been awarded our own Institutional Review Board to approve research independent of higher education institutions. This foundation will enable us to do deeper work in our communities and scale our work in partnership with others.

In parallel to what we’ve been doing these first five years, we’ve also been deeply engaged in how we “be” in this work. We’re building the future of work, a workplace that none of us have experienced before. For the past three years we have implemented an organization-wide monthly sabbatical to prioritize our collective rest. We advance progressive policies and practices that support the unique needs of Black women, queer folks, and caregivers.

I’m thankful to our Advisory Council, Board of Directors, Royal Team, clients, partners, and funders who saw the promise of our work. We all have different roles to play in advancing liberation and I’m clear that we couldn’t have made it this far without you. We are quite literally building a future that none of us have ever experienced, and we’re transforming ourselves in the process.

Now we ask ourselves – What are the next blocks that we need to build to deliver on the promise of the beloved community? That’s what this strategic plan is about. I look forward to talking with you more about where we’re headed and how we’ll get there together.

Welcome to our beloved community,

Rhonda

“We’re claiming  
it already, but  
we’re actually not  
yet [a beloved  
community]. This  
is a hope for the  
future.”

–Rev. Dr. Starsky Wilson





**WHY BELOVED EXISTS**

We are devoted to creating pathways towards racial equity that will endure beyond our time. While standing in service of this work, Beloved has made a choice to seek joy, to stand in for ourselves as aggressively as we stand in for others, and to know we deserve the same full-bodied wellness we wish for the people we serve. This ongoing fight to disrupt systems that bind Black and other marginalized communities will long outlive us. What took 400 years to build may take 400 years to dismantle.

**OUR PURPOSE**

**INTERNALLY**

To live as a Beloved Community, providing a model of a human-centered organization that dismantles oppressive systems by engaging in actionable love. We do this by:



Creating the space where folx can bring their authentic selves.



Positioning rest and rejuvenation as essentials.



Centering all work in joy and levity, incorporating art, song, and personal testimony.



Focusing on collaboration, communication, and transparency.



Building with love and curiosity.



# OUR PURPOSE

## EXTERNALLY

To create economic growth and equitable access to schools, housing, and employment for all BIPOC people. We do this by:



Building the capacity of members of regional coalitions (representatives from housing agencies, corporations, schools, nonprofits, and small businesses) to serve BIPOC populations and develop BIPOC talent pipelines.



Advocating for local and regional policy shifts that create more socioeconomically inclusive schools and housing communities.



Transforming corporations of all sizes and across industries to become vocal and visible leaders promoting the value of a diverse workforce.



Developing dynamic BIPOC leaders of change.



Training community-based researchers and partnering with universities to elevate marginalized voices and reshape what research is deemed authentic and rigorous.



Transforming how foundations prioritize funding initiatives to focus on dismantling systems of racial oppression.





# STRATEGIC PLAN RATIONALE

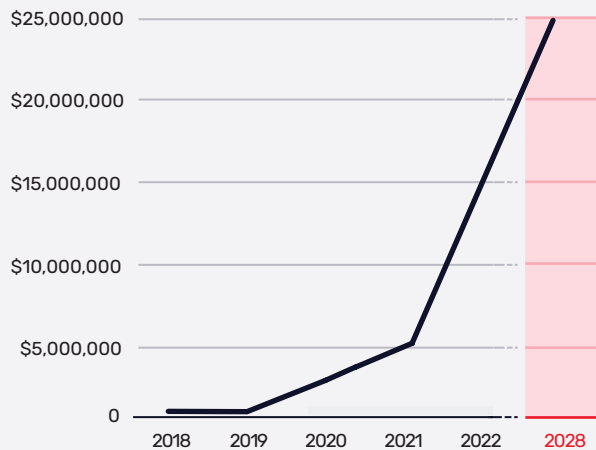
We are strongly positioned for growth. Beloved Community has a compelling mission and vision, coupled with clear and powerful values. Since starting with a single founder in 2019, Beloved has grown into an organization with a \$7 million operating budget, over 30 employees, and has impacted over 500,000 individuals in a single year. In this short time, we have built a best-in-class suite of web-based DEI products, launched an Institutional Review Board that supports community-led research, and implemented a one-of-a-kind organization-wide sabbatical that allows all staff to reclaim the right to rest.

This plan will launch Beloved into the next phase of our organizational life-course. Fully enacted, the plan will create a regional tipping point in New Orleans and the blueprint for expansion into other regions.

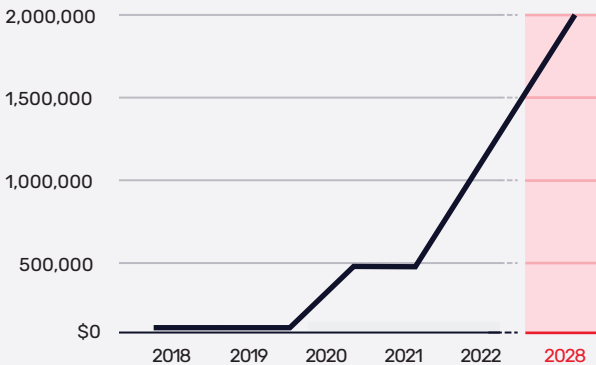
Over the course of the next five years, we will develop the internal infrastructure necessary to ensure fiscal security, create a model anti-racist human-centered organization, and weave our processes for innovation and continuous improvement into our organizational DNA.

By 2028, we will launch an independent for-profit technology company offering award-winning tools. We will be a leader in equity-focused research, training community members, redefining what counts as "legitimate knowledge," and creating the systems to measure the effectiveness of initiatives that transform communities and improve the material conditions of Black, Indigenous, and People of Color.

Annual Revenue



Total Number of Individuals Impacted



By 2028, we will create a revenue stream from our cutting-edge data and research expertise and become a preeminent thought leader in the field of Diversity, Equity, and Inclusion.



Beloved Community's future vision and outcomes

By the time we have **fully implemented this plan**, we will have impacted 2 million individuals. We will raise an additional **\$30 million to enact this plan**. Once implemented, the plan will be fully financially sustainable and **position Beloved to continue to grow its impact**.

## ORGANIZATIONS THAT HAVE SUPPORTED BELOVED

We are grateful for the following partners whose visionary leadership in creating a more equitable society and generous support has enabled us to impact over 500,000 individuals in our first 5 years.





IMPACT

497  
Organizations Served

“When I saw Beloved Community’s values and mission, I was like this is it, this is perfect. They are centering communities and populations that have not only been historically marginalized but continue to be marginalized and oppressed.

**Dr. Samantha Francois**  
Assistant Professor

**Sonja Bilger Romanowski**  
Early Career Professor

**Tulane University**  
School of Social Work

“Partnering with Beloved Community gave us a vocabulary to pinpoint our challenges and to build a shared language amongst our team. It’s one thing to participate in a training on DEI or belongingness – but Beloved Community’s approach is different because it involves creating an actual plan for impact.

**Rebekah Cain**  
COO  
FirstLine Schools



“Working with Beloved was a phenomenal process. A lot of the data that came up from those processes early on helped us start to understand this idea of power and shared decision-making and shared information, which is something that – if I am speaking freely – was very difficult for our organization to wrestle with.

**Anonymous**



“There’s a special, delicate way that they [Beloved] connect with people. It’s genuine, it’s authentic, every step of the way. I think it makes it easier to trust and build. There are organizations that will say one thing and do another, and they’re not that. They embody what they value, and it just spreads.

**Dorian Spears**  
National Program Partnerships and Strategy Lead, GET Cities



“For our U.S. programs, we’re really focused on education and economic mobility. Our goal is that neither race nor socioeconomic status will be a predictor of a student’s, or community’s, life outcomes. What the Equity Lens Map and the Equity Audit do is help organizations bring their opportunities to advance [those goals] as change-agents into focus.

**Opokua Oduro,**  
Senior Program Officer,  
Bill and Melinda Gates Foundation



“Through the support of Rhonda and her team, we have created a three-year Equity Plan. Our board of directors loves it. They’re on board, they’re supportive. But more importantly, our students and our families co-created it with us. We’re in year two of that plan, and across the years, we’ve received feedback and coaching from Rhonda and her team.

**Keeanna Warren,**  
Associate Executive Director,  
Purdue Polytechnic High School

over 500,000  
Individuals Impacted



## ENVIRONMENTAL SCAN

### THE FUNDING LANDSCAPE

The murders of Breonna Taylor, George Floyd, and others in the spring of 2020 led to a wave of nationwide protests against police brutality that unleashed a flood of resources to racial justice groups. Donors big and small gave to racial justice organizations, while corporations, nonprofits, schools, and institutions of higher education rushed to get DEI training. It was a watershed moment for black-led organizing groups.

Unprecedented grassroots donations led the way in funding during the early days of protests, and then corporations pledged to step in as a force for societal change. Leading black and racial justice organizations were the recipients of a majority of these donations, with an estimated 51% of funds allocated to institutions like the NAACP, the Equal Justice Initiative, and Black Lives Matter.<sup>i</sup> The racial justice movement had an even broader impact on charitable giving against the backdrop of the Covid-19 pandemic – more than a third of the \$20.2 billion in U.S. funding donated by corporations and other philanthropic sources to address the pandemic in 2020 was specifically earmarked for communities of color.<sup>ii</sup>

By all accounts, 2020 brought a tidal wave of promised funding to combat systemic racism, but follow-up research has shown a more complicated reality: It is difficult

to assess whether donors, corporations, and foundations are making good on their promises.<sup>iii</sup> Further muddying the waters, corporate spending captures philanthropy as well as non-philanthropic corporate investments in service of racial equity, including internal diversity efforts, anti-racist speakers, product changes, banking relationships, and supplier diversity.<sup>iv</sup> Additionally, after the initial wave of resources flooded public school districts, funding shifted as anti-CRT initiatives began to pass. This trend continues, as demonstrated by the states of Florida and Texas, which banned the spending of state money on DEI initiatives. Despite the backlash in some regions, demand will continue to grow as organizations identify the need for equity-focused work. Additionally, foundations and corporations will continue to allocate significant resources to fund DEI initiatives.

Our optimism is rooted in the following: In 2020, the global market for DEI – that is, dollars spent by companies on DEI-related efforts such as employee resource groups (ERGs) – was estimated at \$7.5 billion and is projected to more than double to \$15.4 billion by 2026.<sup>v</sup> A recent survey of 200 financial leaders by Dow Jones showed that Environmental, Social,

and Governance (ESG) investments will likely more than double during the next three years, comprising 15 percent of all investments by the companies in 2025.<sup>vi</sup> Additionally, a survey of DEI executives from over 300 organizations across industries indicated that 89% of these companies have a formal DEI strategy in place and 79% were planning to allocate additional budget and/or resources to DEI in 2022.<sup>vii</sup>

The record amount of funding committed to racial equity over the past few years and the projected allocations are heartening, but equity organizations need to describe measurable outcomes for pledged dollars if they hope to direct sustained investment across generations.<sup>viii</sup> Foundations, individual donors, and companies large and small will want to know if their money is having the intended effects. Ultimately, funders will want to direct their monies towards the most successful efforts at reducing racial injustices, so creating measurable outcomes will be an important aspect of our efforts to attract and retain funding.

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# ENVIRONMENTAL SCAN

## THE FIELD OF DEI PROVIDERS

There are several notable organizations that provide DEI services (see the accompanying table below for a high-level analysis of the most significant organizations in the space). Each organization is distinctive, but here is what differentiates us:

### 01

We have a place-based strategy that intentionally works across sectors so BIPOC individuals can access inclusive and equitable environments at school, work, and in housing. This deep commitment to a city or region allows us to develop mutually reinforcing relationships with key actors and organizations. By creating this ecosystem of transformation, we are leading the way to equity-based generational change that will endure.

### 02

We have well-established and respected research and data infrastructure. In addition to conducting independent analysis, research, and policy review, our Institutional Review Board (IRB) supports community-led research, and we train marginalized adult and youth populations in research methods.

### 03

We have developed the national standard for organizational equity assessments. Our assessment suite, Awa, is designed to analyze DEI trends across and within sectors, making it a unique and powerful tool. In 2018, Catalyst-ED conducted a comprehensive landscape analysis of available equity assessments and selected Awa as one of its two most promising tools.

The environmental landscape reveals that we are well positioned to capture the necessary funding to continue to grow and fulfill our mission over the next five years.

While the marketplace for equity-based organizations is crowded, these nonprofits and companies were selected for their similar offerings or services as Beloved Community.

Organization	Mission/Vision	Revenue	Total Net Assets	Key Services
The National Equity Project (NEP)	<p><b>Mission:</b> To transform the experiences, outcomes, and life options for children and families who have been historically underserved by our institutions and systems.</p> <p><b>Vision:</b> NEP is a leadership and systems change organization committed to increasing the capacity of people to achieve thriving, self-determining, educated, and just communities.</p>	<p><b>2020: \$14.5 million</b></p> <ul style="list-style-type: none"><li>- Client: \$4.73 million</li><li>- Philanthropic: \$9.1 million</li><li>- Federal Grants: \$623,000</li></ul>	<p><b>\$9.7 million total net assets or fund balances</b></p> <ul style="list-style-type: none"><li>- \$6.7 million without restrictions</li><li>- \$3.0 million with restrictions</li></ul>	NEP provides consulting and coaching to help leaders and organizations. They design and facilitate professional learning experiences for educators and other leaders to reimagine and redesign their systems for equity. They partner with school districts, organizations, foundations, and communities.
Promise 54	<p><b>Vision:</b> Promise 54 envisions a day when social justice organizations can achieve their missions because they have the right people excelling in the right roles, their teams reflect the communities served, their cultures are inclusive, and their internal systems, policies, and structures are equitable.</p>	<p><b>2020: \$5.4 million</b></p> <ul style="list-style-type: none"><li>- Client: \$4.1 million</li><li>- Philanthropic: \$800,000</li><li>- Federal Grants: \$480,000</li></ul>	<p><b>\$5.2 million total net assets or fund balances</b></p> <ul style="list-style-type: none"><li>- \$3.76 million without restrictions</li><li>- \$1.4 million with restrictions</li></ul> <p>\$2.86 million in savings and temporary cash investments</p>	Promise 54 provides Tailored Partnerships to organizations; Learning Cohorts for individuals; Executive coaching for leaders of organizations; Executive search for organizations and individuals; Data and insights support for organizations to understand their assets and challenge areas at the intersection of talent systems, culture, and DEI.
The Equity Lab	<p><b>Mission:</b> To support individuals and institutions as they take on our most intractable race, equity, diversity, and inclusion (REDI) problems, accelerating our transition towards a more liberatory, community-centered society that values the gifts and potential of all of its members.</p> <p><b>Vision:</b> An equitable, anti-racist citizenry, steeped in action that seeks out and eradicates oppressive systems, creating a more humane and just society.</p>	<p><b>2020: \$2.7 million</b></p> <ul style="list-style-type: none"><li>- Client: \$851,000</li><li>- Philanthropic: \$1.9 million</li></ul>	<p><b>\$2.56 million total net assets or fund balances</b></p> <ul style="list-style-type: none"><li>- \$1.9 million without restrictions</li><li>- \$615,000 with restrictions</li></ul>	The Equity Lab has three core offerings that are designed to help individuals and organizations to engage deeply in race, equity, diversity, and inclusion (REDI) work.
Management Leadership for Tomorrow (MLT)	<p><b>Vision:</b> A world where inequality is no more – where people of color realize their full potential and diverse leadership is no longer “underrepresented.”</p>	<p><b>2019: \$14.007 million</b></p> <ul style="list-style-type: none"><li>- Client: \$2.862 million</li><li>- Philanthropic: \$11.762 million</li><li>- Of note: they hold a single fundraising event that raises nearly \$2 million.</li></ul>	<p><b>\$6.24 million total net assets or fund balances</b></p> <ul style="list-style-type: none"><li>- \$1.74 million without restrictions</li><li>- \$4.5 million with restrictions</li></ul>	MLT’s programs are focused on individuals and are designed to accelerate the careers of high-achieving Black, Latinx, and Native-American individuals. MLT prepares talented, diverse individuals to get on and stay on the path to leadership with programs that span the career spectrum.

## ORGANIZATIONAL ASSESSMENT

### STRENGTHS



Strong external reputation characterized by reoccurring foundation funding and high regard from collaborators and clients.



Deep subject matter expertise and capacity to conduct rigorous and relevant original research.



Best-in-class suite of web-based products that are built to evolve and adapt.



High-quality talent and staff that feels an intense connection to the mission, strong sense of belonging, and carries out work with love.



Powerful vision of collective action that has the possibility to create meaningful and lasting social change.

### OPPORTUNITIES

#### 01

**Capitalize on current strategic regions by developing deeper connections to key funders and organizations to become the preeminent provider of equity work.**

Our strategic foothold in New Orleans, Memphis, Kansas City, and Indianapolis can be used to leverage and expand local philanthropic investments, ensure more predictable revenue, engage alumni, and ultimately generate lasting change. This work will begin in New Orleans as we fully implement all aspects of our robust theory of change. We will use the work in New Orleans to refine our process and build the in-house capacity to create the roadmap for success in other regions.

**We are positioned to create a new paradigm for research by training community members, including youth, to become researchers and to use the rigorous data they collect to create policy change.**



#### 02

**Build out capacity in the Data, Research, Impact, and Policy (DRIP) Center to become a leader in equity-based research, changing how research is funded, conducted, and disseminated.**

We are positioned to create a new paradigm for research by training community members, including youth, to become researchers and to use the rigorous data they collect to create policy change. Additionally, we will use our access and credentials to partner with universities to conduct original research and expand who has access to conducting, collaborating on, and publishing research.

To broaden the scope of our impact, we will disseminate “our” findings to a wide audience – publishing in a range of venues, including peer-reviewed journals, community-based blogs, and self-published white papers. We will use our position to present with partners at local and national conferences as well as to convene our own conferences.

Becoming the leader in equity-based research will generate new funding opportunities and provide a foundation to develop new products and services.



## ORGANIZATIONAL ASSESSMENT OPPORTUNITIES

### 03

#### Expand suite of web-based measurement tools.

The Awa platform is unique and has been externally validated as one of the most promising equity tools. Awa is distinctive because it engages different users – administrators, leaders, funders, and community leaders – in all sectors that we serve. Unlike other tools on the market, Awa is designed to support multiple sectors, meaning we will have data to analyze DEI trends across and within sectors. This will provide insights into what is fundamentally unique about particular industries/sectors and enable us to develop work plans accordingly.

Additionally, we have developed the logic in our tools to be applied in global contexts, including flexibility to modify to meet the nuances of local culture and multilingual versions; these can be used in minoritized language communities in the U.S. as well as in global contexts.

**Awa is a best-in-class suite of web-based products that are built to evolve and adapt and provides us with a tremendous opportunity to generate impact and revenue.**



### 04

#### Lead in the creation and measurement of DEI outcomes data.

Institutional and large individual donors are increasingly looking to understand the difference their funding makes in people's lives, and they want to see proof of these outcomes. Additionally, companies want to know their investments are producing results.

The ability to demonstrate which programs are most effective at creating change and implementing new ways to measure this progress over the long term provides us with a tremendous opportunity to secure funding and position Beloved as the leader in the DEI field. These data will also be instrumental in improving policy and practices and providing transparency to clients and communities.

We are well positioned to do this because of our deep relationships within locations, proximity to the community, and our capacity to collect data and conduct research.

By 2028 we will have impacted  
2 million individuals.

## OVERVIEW OF BIG ROCKS



### ROOT

Enact full theory of change  
in New Orleans and deepen  
engagement in other  
existing regions



### FORTIFY

Strengthen internal capacity  
and ensure fiscal security to  
achieve impact



### GROW

Position Beloved as a  
national and international  
leader in equity-based work





# ROOT

Root is going deep and enacting the full theory of change in New Orleans – impacting policy and practice in schooling, housing, and employment.

Root is working with partners in New Orleans to define the metrics and targets that indicate equity has been achieved – what success looks like. It is also defining leading indicators and regional processes for using data to monitor progress, drive innovation, and make modifications.

Root is becoming the backbone organization in New Orleans that catalyzes generational change – bringing together business and nonprofit partners, community leaders, and policy makers.

Root is growing client revenue and establishing relationships with local foundations and individuals dedicated to supporting regional change.

Root is creating the infrastructure within Beloved central office to capture learnings from the work in New Orleans to design the blueprint for expansion. Likewise, Root is using policy work in New Orleans to create a policymaking framework for Beloved.

Enact full theory of change in New Orleans and deepen engagement in other existing regions.

## 01

### STRATEGY

Deepen relationships among organizations, agencies, and corporate partners to reach a tipping point in New Orleans.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"><li>- Establish regional benchmarks for impact.</li><li>- Create cross-organization planning group.</li><li>- Develop value proposition for organizations (non/for profit) across sectors.</li></ul>	<ul style="list-style-type: none"><li>- Develop/hire capacity in workforce and housing.</li><li>- Hire New Orleans Regional Director.</li><li>- Convene cross-organization planning group quarterly.</li></ul>	<ul style="list-style-type: none"><li>- Convene cross-organization planning group in New Orleans.</li><li>- Establish relationship with two new foundations.</li><li>- Establish housing and workforce expertise in New Orleans.</li></ul>
KEY RESULTS	<ul style="list-style-type: none"><li>- Regional benchmarks identified and tested in New Orleans.</li><li>- Social change ecosystem map for New Orleans drafted.</li><li>- New Orleans tipping point identified and action plan towards that objective developed.</li></ul>	<ul style="list-style-type: none"><li>- FY26 goals reached for the number of organizations engaged.</li><li>- 25% of NOLA Region operational revenue secured.</li></ul>	<ul style="list-style-type: none"><li>- Recognized as expert in housing and workforce strategy by local organizations and businesses.</li><li>- Year-over-year growth in percentage of NOLA Region operational revenue secured.</li></ul>



02

STRATEGY

Develop regional model in order to scale effectively in other regions.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"><li>- Document sequence of regional actions and investments required to establish a regional model.</li><li>- Create dedicated cross-functional expansion team poised to pursue regional expansion.</li><li>- Create robust system to track and act upon data gathered from the New Orleans expansion.</li><li>- Assess model options (FY 25 select regional model).</li><li>- Establish goals and metrics to determine the success criteria for the new regional expansion.</li></ul>	<ul style="list-style-type: none"><li>- Open New Orleans regional office.</li><li>- Create clear structure for communication between central office and New Orleans region.</li><li>- Clarify which decisions and responsibilities belong to the central office and which belong to the new sites.</li><li>- Capture learnings and iterate on structure and processes.</li></ul>	<ul style="list-style-type: none"><li>- Hire VP of expansion.</li><li>- Expand New Orleans team.</li><li>- Hire Executive Director in one additional region.</li></ul>
KEY RESULTS	<ul style="list-style-type: none"><li>- Process documents, including financial model, new regional assessment tool, roles and responsibilities for expansion research using the central office New Orleans expansion model.</li></ul>	<ul style="list-style-type: none"><li>- Framework for starting other regions.</li><li>- Financial model for regional sustainability vs. contributions towards national operations.</li><li>- Central office infrastructure to support expansion.</li></ul>	<ul style="list-style-type: none"><li>- A new regional office outside of New Orleans.</li><li>- New Orleans office fully staffed.</li><li>- Central office staffed for expansion.</li></ul>

03

STRATEGY

Impact city/regional policy to create the conditions necessary to bring about lasting generational change.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"><li>- Hire policy director to focus on creating policy change in Louisiana.</li><li>- Design indicators for policy impact.</li><li>- Create structure to tell policy stories.</li></ul>	<ul style="list-style-type: none"><li>- Identify long-term policy initiatives on regional and national levels.</li><li>- Track key indicators.</li><li>- Refine policy making framework.</li></ul>	<ul style="list-style-type: none"><li>- Host policy making convention in New Orleans.</li><li>- Publish policy-making whitepaper.</li></ul>
KEY RESULTS	<ul style="list-style-type: none"><li>- Policy making framework.</li><li>- Policy recommendations from NOLA CARES project: policy briefs, community forums, memos to policy makers.</li></ul>	<ul style="list-style-type: none"><li>- Policy making frame v. 2</li><li>- Publications that trace the impact of NOLA CARES project on early childhood education workforce in New Orleans.</li><li>- Case study (NOLA CARES) published.</li></ul>	<ul style="list-style-type: none"><li>- Plan for impacting policy in other regions.</li><li>- BIPOC benefits cliff policy for New Orleans with city council.</li></ul>

Root is going deep and enacting the full theory of change in New Orleans – impacting policy and practice in schooling, housing, and employment.





# FORTIFY

Fortify is strengthening internal capacity and processes to allow us to flourish. Fortify is moving beyond a founding board to using advisory boards to gain local insights and demonstrate commitment.

Fortify is creating King’s Beloved Community within the organization – following his model, creating and recreating the Beloved Community within our organization as an exemplar for other organizations.

Fortify is developing organizational capacity and acumen across financial, accounting, and philanthropic development. This will ensure fiscal security, allowing us to accurately model revenue and cost by location and product and to make financial predictions.

Fortify is defining a scope and sequence of services to create both enduring change for partners and lasting multi-year projects for us to generate predictable and reoccurring revenue.

Fortify is increasing unrestricted revenue, including a robust individual giving campaign, to build budget flexibility that will permit strategic resource allocation.

Fortify is increasing cash reserves for stability and laying the foundation for the creation of an endowment.

**We will continue to work together to make Beloved a GREAT PLACE TO WORK by recruiting, hiring, developing, retaining, and rewarding our amazing people.**

**Beloved will always be a place where all employees can show up as their authentic selves and prioritize their well-being.**

Strengthen internal capacity and ensure fiscal security to achieve impact.

## 01

### STRATEGY

Develop national board and regional advisory boards to recruit, develop, and sustain leaders to scale with impact.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"><li>- Create matrix of board competencies.</li><li>- Expand national board from four to six to increase reach and capacity.</li><li>- Create plan/by-laws in preparation for creation of local advisory boards.</li><li>- Curate members for New Orleans regional board.</li></ul>	<ul style="list-style-type: none"><li>- Create New Orleans advisory board.</li><li>- Expand national board from six to eight to increase reach and capacity.</li><li>- Create best-in-class total rewards package for outstanding leaderships of C-suite.</li></ul>	<ul style="list-style-type: none"><li>- Establish advisory boards in three regions.</li></ul>
KEY RESULTS	<ul style="list-style-type: none"><li>- Four board meetings with six national board members.</li><li>- Advisory board by-laws established and reviewed by board.</li></ul>	<ul style="list-style-type: none"><li>- Four board meetings with eight board members.</li><li>- New Orleans advisory board launched.</li></ul>	<ul style="list-style-type: none"><li>- Advisory board launched in one region.</li><li>- 90% C-suite satisfaction.</li></ul>
	<ul style="list-style-type: none"><li>- National board comprising members with diverse perspectives, skills, and experiences who support and inform our strategy.</li></ul>		

02

STRATEGY

Create fiscal security to ensure that the necessary resources to enact mission are available.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"> <li>- Augment development capacity to increase nonrestricted revenue and individual giving.</li> <li>- Augment finance and accounting capacity to ensure better predictions and accuracy.</li> <li>- Create business development strategy linked to size and capacity of sales team/ infrastructure.</li> <li>- Develop metrics for internal success (i.e., cash on hand, internal promotions).</li> <li>- Create three-year financial projections roadmap to support fiscal and programmatic planning.</li> </ul>	<ul style="list-style-type: none"> <li>- Launch individual giving campaign to diversify dependence on philanthropic partners.</li> </ul>	<ul style="list-style-type: none"> <li>- Launch endowment campaign (\$30 million target) with additional FTEs to support.</li> </ul>
KEY RESULTS	<ul style="list-style-type: none"> <li>- Client revenue at least 30% of operating budget.</li> <li>- Three-month run rate.</li> </ul>	<ul style="list-style-type: none"> <li>- 85% of clients retained in multi-year engagements.</li> <li>- Client revenue at least 50% of operating budget.</li> <li>- Maintain six-month run rate and an additional 6% of annual budget.</li> <li>- 3% of annual revenue is unrestricted.</li> </ul>	<ul style="list-style-type: none"> <li>- 85% of clients retained in multi-year engagements.</li> <li>- Client revenue at least 70% of operating budget.</li> <li>- \$500,000 in individual donor revenue.</li> <li>- Maintain six-month run rate and an additional 8% of annual budget.</li> <li>- 4% of annual revenue is unrestricted.</li> </ul>

03

STRATEGY

Build out arc of client engagement to sustain collaborative work over time.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"> <li>- Create customer multi-year journey with benchmarks for engagement and progress towards equitable impacts.</li> <li>- Collect customer satisfaction feedback.</li> <li>- Establish process for productive development.</li> </ul>	<ul style="list-style-type: none"> <li>- Develop aligned products and services.</li> <li>- Launch alumni programing.</li> </ul>	<ul style="list-style-type: none"> <li>- Maintain client engagement for two to five years and develop partnerships in regional transformation.</li> <li>- Hire senior-level leaders for product development/client services.</li> </ul>
KEY RESULTS	<ul style="list-style-type: none"> <li>- Customer journey map.</li> <li>- Metrics and goals established for customer satisfaction and Net Promoter Score. (50+)</li> <li>- Metrics and goals established for revenue from recurring customers.</li> <li>- Metrics and goals established for engaging alumni.</li> </ul>	<ul style="list-style-type: none"> <li>- Goals for FY26 reached for customer satisfaction and Net Promoter Score. (60+)</li> <li>- Goals for FY26 reached for revenue from recurring customers.</li> <li>- Goals for FY26 reached for engaging alumni.</li> </ul>	<ul style="list-style-type: none"> <li>- 85% customer satisfaction and at least a 9 Net Promoter Score. (80+)</li> <li>- Goals for FY28 reached for revenue from recurring customers.</li> <li>- At least 250 alumni engaged in New Orleans.</li> </ul>



04

STRATEGY

Strengthen internal culture so that Beloved is recognized as the model for human-centered employers.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"> <li>- Deepen investment in organizational culture and measure by retention, performance on Equity Audit, and staff satisfaction.</li> <li>- Design and implement team talent expectations: onboarding, goal-setting, feedback, training, and development.</li> <li>- Augment HR capacity through staff and consultants to create staff handbook.</li> <li>- Develop staff/team annual professional learning plans.</li> </ul>	<ul style="list-style-type: none"> <li>- Build process to tell our story to other organizations.</li> <li>- Host internal sessions focused on wealth building, housing purchase, and personal planning to support staff.</li> </ul>	<ul style="list-style-type: none"> <li>- Share training and development tools on contract basis with other nonprofits/for-profits.</li> </ul>
KEY RESULTS	<ul style="list-style-type: none"> <li>- 75% employee satisfaction.</li> <li>- 75% inclusion score on Equity Audit.</li> <li>- Creation of talent management processes.</li> <li>- Staff handbook.</li> <li>- Chapter in DEI anthology.</li> </ul>	<ul style="list-style-type: none"> <li>- 85% employee satisfaction.</li> <li>- 85% inclusion score on Equity Audit.</li> <li>- Policies and structure recognized as exemplary models</li> <li>- HBR article or series of articles.</li> <li>- Recognized as best place to work by local Chamber of Commerce and national organizations.</li> </ul>	<ul style="list-style-type: none"> <li>- 85% employee satisfaction.</li> <li>- 95% inclusion score on Equity Audit.</li> <li>- Book on Beloved.</li> </ul>



Fortify is strengthening internal capacity and processes to allow us to flourish.



# GROW

Grow is moving beyond our current work and expanding the reach and impact of Beloved.

Grow is launching a for-profit technology company to generate the investment necessary to innovate and develop products.

Grow is producing award-winning products and reoccurring revenue from tools that will create great impact and deliver what clients need.

Grow is expanding to new markets, including beginning to work internationally. Grow is listening to clients and incubating new products.

Grow is expanding our thought leadership by publishing articles and op-eds, increasing media coverage locally, nationally, and ultimately internationally.

Grow is working with foundations to focus their giving on initiatives that dismantle racist structures.

**The creation of a for-profit technology company will generate the infusion of capital necessary for the continual innovation of the Awa suite of tools as well as the full investment in a sales and marketing infrastructure.**

**We will create a relationship between Beloved and the new tech company that balances the potential to generate continual revenue for Beloved with the freedom necessary for the Technology Company to raise capital.**

Position Beloved as a national and international leader in equity-based work.

## 01

### STRATEGY

Launch for-profit Technology Company to create the best-in-class DEI survey and supporting tools.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"><li>- Convene panel of experts to advise on the process for the creation of the for-profit Technology Company.</li><li>- Create internal infrastructure to manage Awa transition.</li><li>- Work with legal team to build intellectual property (IP) strategy.</li><li>- Work with legal team to draft a range of potential relationships between Beloved and the new Technology Company and iterate based on initial investors' feedback.</li></ul>	<ul style="list-style-type: none"><li>- Develop spinout strategy for Technology Company (determine relationship with nonprofit, including board seats and equity).</li><li>- Hire third party to conduct a fair market value assessment.</li><li>- Search and hire the CEO for the Technology Company.</li><li>- Review patent and trademarks.</li><li>- Identify initial investors.</li><li>- Create staffing structure for Technology Company (FY27).</li></ul>	<ul style="list-style-type: none"><li>- Launch Technology Company.</li><li>- Identify additional investors.</li></ul>
KEY RESULTS	<ul style="list-style-type: none"><li>- Business case of for-profit.</li><li>- Job description for CEO.</li><li>- IP strategy.</li></ul>	<ul style="list-style-type: none"><li>- Total available market (TAM).</li><li>- CEO.</li><li>- For-profit – nonprofit relationship established.</li><li>- \$2 million in initial investment.</li></ul>	<ul style="list-style-type: none"><li>- Independent Technology Company.</li><li>- \$5 million in investment.</li></ul>



STRATEGY

Increase thought leadership and earn recognition as premier DEI organization.

FY24	
KEY ACTIVITIES	<ul style="list-style-type: none"> <li>- Establish local, national, and international thought leadership metrics for Inputs, outputs, and outcomes.</li> <li>- Create central structures to capture learning and impact data to enable focus on continuous improvement/innovation.</li> <li>- Increase marketing and communications capacity through staff or consultants.</li> <li>- Use internal (website) and external (newspapers, blogs) methods to spotlight staff members who implement creative solutions and innovative strategies.</li> </ul>
KEY RESULTS	<ul style="list-style-type: none"> <li>- A knowledge management system to capture After-Action Review reflections from customer engagement.</li> <li>- White papers on innovations and policy wins on Beloved’s website.</li> <li>- A community forum to engage partners around research findings, an identified policy campaign, or a New Orleans case study.</li> </ul>



	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"> <li>- Identify first cohort of Beloved research fellows.</li> <li>- Convene national conversations on equity in multiple sectors.</li> <li>- Capture lessons learned in two additional white papers or case studies.</li> <li>- Host a national fellowship cohort (comprising faculty, postdocs, and practitioners).</li> <li>- Spotlight staff member for innovations each quarter; identify external venues with national readership.</li> </ul>	<ul style="list-style-type: none"> <li>- Identify second cohort of Beloved research fellows.</li> <li>- Continue to spotlight staff and extend to partners who collaborate to reach regional tipping point.</li> </ul>
KEY RESULTS	<ul style="list-style-type: none"> <li>- Reach goals (across regional segments where relevant) for inputs (i.e., conference presentations, speaking engagements, blogs, and publications in academic journals, community forums, and media outlets).</li> <li>- Reach goals (across regional segments where relevant) for outputs (i.e., SEO ranking, website hits, social media followers, media mentions, backlinks, invited presentations and articles, keynote addresses, guest appearances on podcasts with at least 93 downloads [top quartile], citations in academic publications).</li> <li>- Reach goals (across regional segments where relevant) for outcomes (i.e., grants awarded, philanthropy raised, and client deals converted).</li> </ul>	<ul style="list-style-type: none"> <li>- A (trade) book that tells the inspirational story of the organization and its impact.</li> <li>- Reach goals (across regional segments where relevant) for inputs (i.e., conference presentations, speaking engagements, blogs, and publications in academic journals, community forums, and media outlets).</li> <li>- Reach goals (across regional segments where relevant) for outputs (i.e., SEO ranking, website hits, social media followers, media mentions, backlinks, invited presentations and articles, keynote addresses, guest appearances on podcasts with at least 93 downloads [top quartile], citations in academic publications).</li> <li>- Reach goals (across regional segments where relevant) for outcomes (i.e., grants awarded, philanthropy raised, and client deals converted).</li> </ul>

03

STRATEGY

Scale to new regions, international partnerships, and new work to increase Beloved’s impact beyond existing clients.

	FY24	FY26	FY28
KEY ACTIVITIES	<ul style="list-style-type: none"> <li>- Develop framework for pursuing new products/ services.</li> <li>- Create target list for international partners/ locations.</li> <li>- Convene cross-functional team to assess organizational capacity to take on nonregional work and work not aligned to current services.</li> <li>- Establish comprehensive cost accounting systems and processes.</li> </ul>	<ul style="list-style-type: none"> <li>- Establish framework for international clients/ partnerships.</li> <li>- Update national office structure and relationship to regional offices, including flow of funds and decision-making authority.</li> <li>- Begin process to establish new region (FY27).</li> </ul>	<ul style="list-style-type: none"> <li>- Use learning from international engagements to design pilot for expansion (towards Global Office).</li> </ul>
KEY RESULTS	<ul style="list-style-type: none"> <li>- Products/services innovation process created.</li> <li>- Framework to determine when to take on work that is not within current regions or providing services not within current portfolio.</li> <li>- Predictable revenue and expenses resulting in accurate staffing capacity projections.</li> </ul>	<ul style="list-style-type: none"> <li>- One international partner.</li> <li>- One new product or service developed.</li> </ul>	<ul style="list-style-type: none"> <li>- Two international partners.</li> <li>- One new region.</li> </ul>

Grow is moving beyond our current work and expanding the reach and impact of Beloved.





## ENABLING FACTORS

Throughout the five years of this plan, we will continue to increase our **utilization of data to drive innovation and continuous improvement**, and **to build operational excellence** into our organizational DNA.

These elements will permeate all that we do, enabling us to create the impact Beloved is destined to deliver.

## INNOVATION AND THE UTILIZATION OF DATA TO ITERATE AND DRIVE CONTINUOUS IMPROVEMENT

Since our inception, the use of data to drive improvements and innovation has been at the heart of what we do.

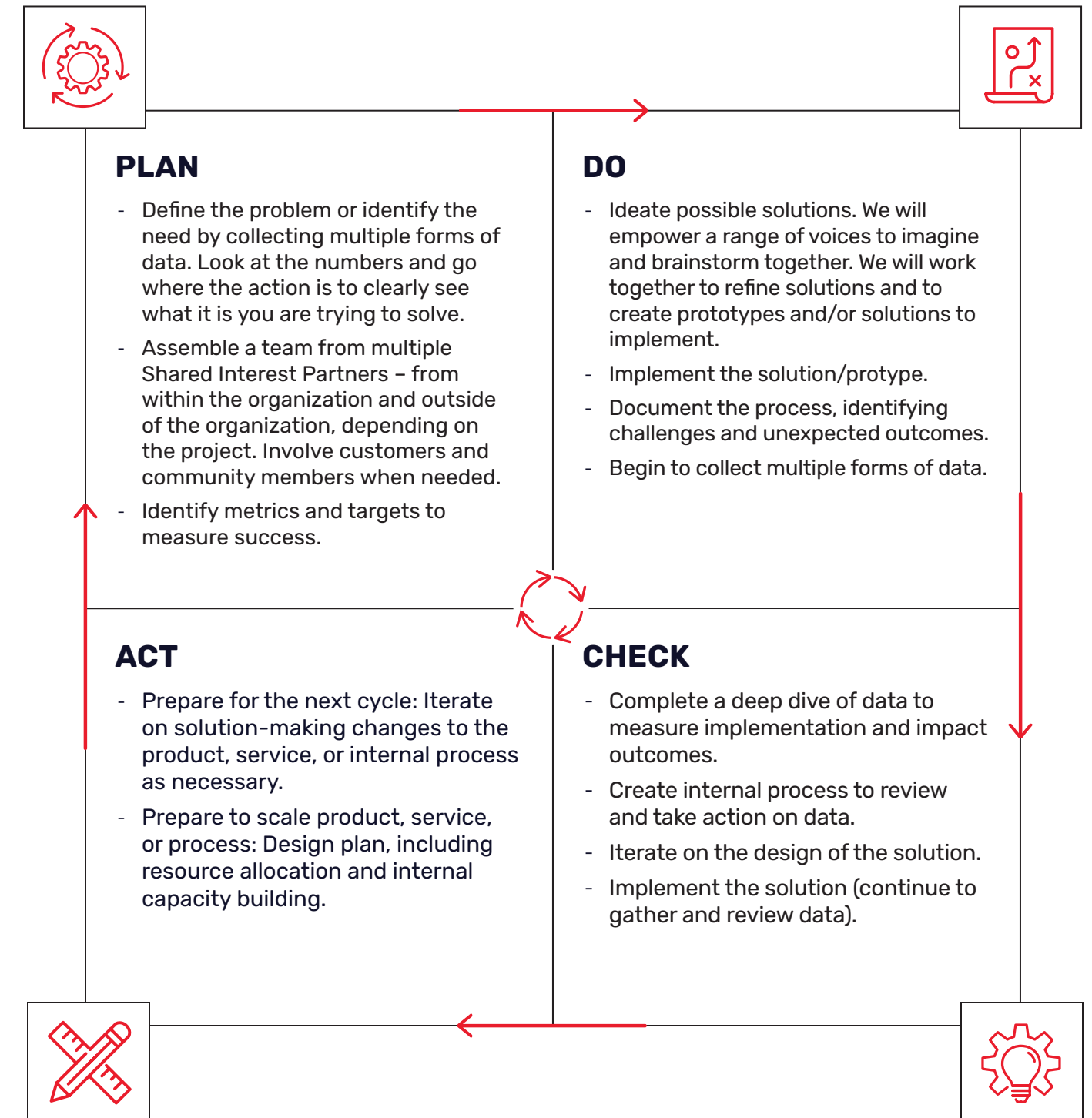
Rhonda created Beloved with self-care and rest as central elements of the organization. To operationalize these foundational tenets, she created a policy of unlimited PTO.

After a year, she reviewed the PTO data and discovered people were not taking much, if any, PTO. As she collected additional data by talking to folks in the organization, she found that the root of limited use of PTO was that people did not want to leave their team shorthanded.

Rhonda's conclusion was that unlimited PTO was necessary but not sufficient to ensure the team practiced the self-care necessary for Beloved to be successful. So, she created an organization-wide sabbatical. Now, every year, the entire Beloved team takes February as sabbatical.

The creation of sabbatical provides a concrete example of how Beloved uses data to improve and innovate. We will continue to refine and formalize this cycle. While others may separate the innovation and continuous improvement cycles, we find value in their integration. At the core of our cycle is a mindset of curiosity, collaboration, and iteration, with a focus on the use of data.

We use this process to drive improvements in internal processes as well as in the development of products and services to meet customer demands.



ENABLING  
FACTORS

OPERATIONAL EXCELLENCE

We are well on our way to creating the operational efficiency necessary to scale with impact. The recent hire of a Chief Operating Officer is a significant part of our ongoing process. Over the course of the next five years, we will develop the internal processes necessary for continual growth and regional expansion. We will allocate the resources necessary to build cross-functional teams that will empower employees and build internal capacity.

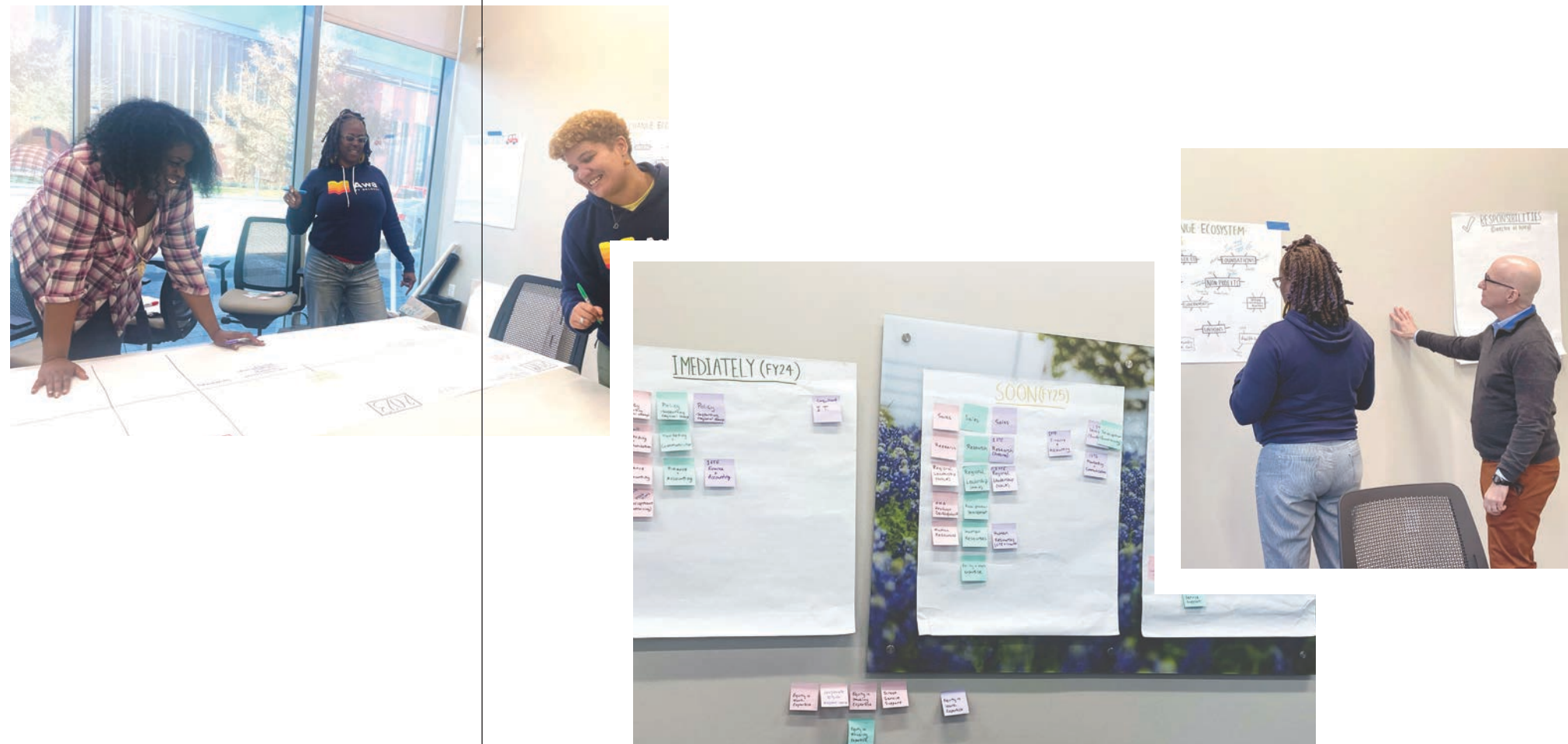
Our focus on engaging best practices in all of our work processes is a joyful commitment. Operational excellence is the foundation that will enable us to dismantle oppressive systems and create economic growth and equitable access to schools, housing, and employment for all BIPOC people.



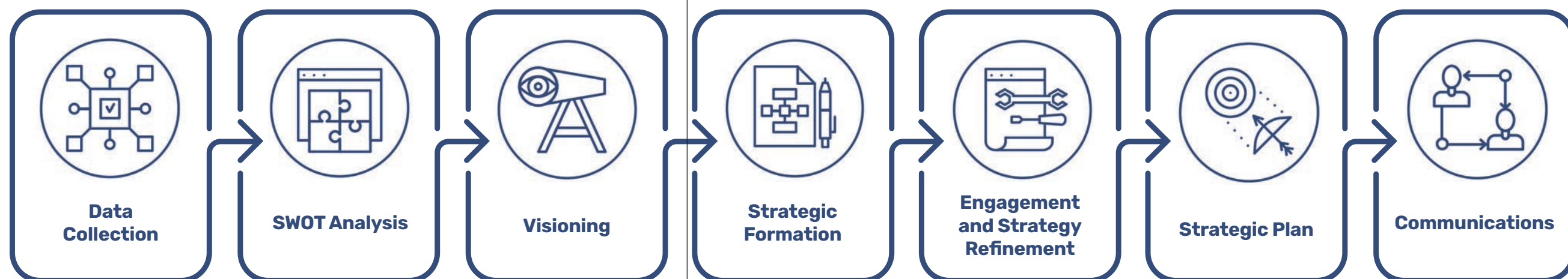


## OUR STRATEGIC PLANNING PROCESS

We partnered with Integrated Impact Group for the development of this strategic plan. The IIG team collaborated across the Beloved organization to collect a range of data from inside the organization as well as from other organizations doing this work. The IIG team conducted interviews with 41 individuals, including staff, clients, funders, board members, and staff from other organizations doing work in the field. The strategic planning team met bi-weekly to refine the process and discuss emerging findings. We met three times with the executive team, twice with the directors' team, and twice with the entire staff.



We engaged in the following steps:



# ENDNOTES

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<sup>i</sup> Lesley Green-Rennis, [Falling Off: Social Justice Funding Plummets to Just 5% of Donation Share](#), Nasdaq, March 2, 2022.

<sup>ii</sup> Aaron Morrison, [AP Exclusive: Black Lives Matter Opens Up About its Finances](#), AP News, February 23, 2021.

<sup>iii</sup> Tracy Jan, et al., [Corporate America’s \\$50 billion promise: A Post analysis of racial justice pledges after George Floyd’s death reveals the limits of corporate power to effect change](#), The Washington Post, August 24, 2021.

<sup>iv</sup> Michael McAfee et al., [Moving from Intention to Impact: Funding Racial Equity to Win](#), PolicyLink and The Bridgespan Group, 2021.

<sup>v</sup> Kweilin Ellingrud, [Diversity, Equity and Inclusion Lighthouses 2023](#), McKinsey & Company, 2023.

<sup>vi</sup> Dow Jones, [Beyond Buzzwords: An Outside-In Approach to ESG and Long-Term Investing Trends](#), September 7, 2022.

<sup>vii</sup> Venture Beat, [Report: 79% of companies say they will raise DEI budget in 2022](#), October 15, 2021.

<sup>viii</sup> Eilleen R. Heisman et al., [What’s Next in Philanthropy in 2022](#), National Philanthropic Trust, January 19, 2022.





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