2022-2026 Strategic Plan
Deepening our commitment to Colorado
Welcome
  • Webinar overview and objectives

Presentation
  • Gates Family Foundation Background
    • Mission, Vision, Values
  • Strategic Plan Overview
    • Community feedback / development process
  • What's Staying?
  • What's New?

Discussion
  • Questions from attendees

Closing
  • Next steps and future engagement
Building on 75 years of addressing some of Colorado’s toughest challenges

➢ Celebrating 75 years of impact
➢ More than $456 million in grants since founding
➢ Continuously evolving while maintaining intense focus on people, communities, and natural resources of Colorado.
Strategic Plan Process: Throughout 2021

LOOKING BACK
Internal Reflection & Assessment

REACHING OUT
Community Feedback

LOOKING AHEAD
Trends, Challenges & Forecasting
MISSION
We work with partners and communities to build a more equitable, resilient, and sustainable Colorado for all.

VISION
A vibrant and verdant Colorado where all people and communities thrive.
Commitment to Equity

We prioritize individuals and communities that have been historically marginalized by addressing systemic barriers and creating pathways to opportunity.
Foundation Approach

- We use both financial and non-financial tools to serve partners and advance core strategies
- Our staff serve as connectors, resources and thought partners in the ecosystems where they work
- We intentionally convene and participate in multi-partner, systems-level work to drive innovative solutions
- We actively seek to collaborate with an even more diverse array of stakeholders and potential partners
2021 Total Philanthropic Activity: $44.5M

- 31% Family Fund Grants: $13,741,927
- 28% FirstBank PPP Loan Facility: $12,500,000
- 21% GFF Grants: $9,271,273
- 8% MRIs: $3,438,531
- 6% PRIs: $2,893,092
- 6% Staff and Admin: $2,683,765
- >1% Hover Building: $4,759
2021 Strategic Grants Paid: $5,699,000

39% Natural Resources $2,232,000
39% Education $2,209,500
15% Community Development $882,500
7% Informed Communities $375,000
2021 Responsive Grants Paid:
$3,572,273

- Community Development: 29% ($1,030,000)
- Education: 26% ($925,000)
- Art and Culture: 16% ($565,000)
- Well-being of Children, Youth and Families: 15% ($535,000)
- Natural Resources, Parks & Recreation: 12% ($437,273)
- Other: 2% ($80,000)
What’s New

- Foundation-wide focus on addressing **climate change** and advancing **diversity, equity and inclusion** across all programs
- Natural Resources expands focus on **forest health** and **watershed restoration**
- **Informed Communities** formally becomes a fourth program area
- Community Development topics (mobility, food systems, placemaking, community planning) encompassed within new focus on **economic mobility** and **place-based community asset-building**, with a particular focus on **affordable housing**
- Increased focus on **leadership development** and **capital project planning support** for leaders and communities of color, and others needing early-stage support
- Increased percentage of Foundation assets dedicated toward **impact investments**
<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Details</th>
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</thead>
<tbody>
<tr>
<td>EDUCATION</td>
<td>23%</td>
<td>Innovative Learning Environments, Innovations in School Systems, Conditions for Sustained Innovation</td>
</tr>
<tr>
<td>NATURAL RESOURCES</td>
<td>23%</td>
<td>Balanced Water Management, Forest Health &amp; Watershed Restoration, Landscape Conservation &amp; Land Trust Capacity</td>
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<tr>
<td>COMMUNITY DEVELOPMENT</td>
<td>12%</td>
<td>Economic Mobility for Individuals and Families, Equitable Community Assets</td>
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<tr>
<td>INFORMED COMMUNITIES</td>
<td>5%</td>
<td>Stronger Civic News Ecosystem, Coverage in Gates' Core Focus Areas, Inclusive News Leadership, Voices &amp; Models</td>
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<tr>
<td>CAPITAL GRANTS</td>
<td>37%</td>
<td>Amplify Needs and Goals for Capital Projects, Leadership and Capital Planning Support for Diverse Leaders</td>
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GOAL

All children, regardless of race or socioeconomic status, have access to educational opportunities that support their long-term success.
Looking Back: 2017-2021 Strategic Plan

Education Focus Areas

Six Focus Areas

- Autonomous Public Schools
- Systems Reform
- Rural Community-Based Programs
- Advocacy
- Human Capital
- Innovation and Incubation
Education Lookback: What We Learned

- Innovation in systems and learning environments has been the highest leverage area of work within Gates' education program
- Lyra and Gates’ combined capacity allows Gates to act quickly and strategically to support innovative efforts across the state
- Design and launch of collaborative funding structures continues to be a strength of the Gates team
- Design and launch of collaborative funding structures continue to be strategic levers
Education: What We Heard

- Technology is more central to teaching and learning than ever
- Solutions to retaining and attracting teachers and principals require clearer equity lens and additional supports in rural Colorado
- Innovation requires more flexible systems to elevate and sustain ideas of students, families, and educators
- More focus on social-emotional learning and mental health support is needed
- Students want to be involved in decisions that impact them
Education: Where We Are

Challenges

Most Colorado students still not performing on grade level - 35 percent of Colorado students are demonstrating proficiency in math, while 46 percent are proficient in English Language Arts.

Inequities in funding support persist. The state's districts serving the most students of color receive about five percent less ($549 less) in funding for each student when compared to districts serving the fewest students of color.

Opportunities

Increased funding at the federal, state, and local levels

ESSER Funding and Biden administration’s Family Plan
Education: Priority Strategies for 2022-2026

**Learning Environment Innovation**
- Support for autonomous schools and new ways of learning

**School System Innovation**
- Lead innovation in school models, policy and governance

**Conditions for Sustained Innovation**
- Diversify the pipeline of educators and support effective state education policies
What's New?

What stays the same

- Support for autonomous public schools with innovative models
- Focus on DEI/equity through advocacy focused on student voice and empowerment
- Continued support for state-level policy work addressing systemic education challenges

What's expanded?

- More support for and greater focus on rural education

What's new?

- Focus on climate change education through school system innovation
- Support for out of system/school learning and innovations
- Funding teacher prep and placement programs for rural schools and districts especially those serving culturally and linguistically diverse student populations
Gates' support might look like:

- Support for new learning models in schools with a very high bar for results
- Support for informal out-of-system learning environments (such as micro-schools or learning pods)
- Support for organizations and individuals that want to pilot new ideas during the summer and out-of-school time
Gates’ support might look like:

- Support for multi-school district partnerships with institutes of higher education around climate change education and/or college and career pathways (Climatarium)

- Continuing to look for new governance and system models that support a) school-level and educator autonomy and academic accountability (Innovation Zones) and b) sustaining innovative initiatives from rural school districts
Gates’ support might look like:

- Support for efforts to diversify, attract, and place talent - particularly in rural areas
- Support for advocacy efforts that elevate student voice
- Support for organizations and initiatives seeking state-level policy changes that advance GFF priorities
- Creating new collaborative and pooled funds with other funders and stakeholders - especially to support innovation
- Helping to launch new organizations (e.g. RootEd, Lyra) to address unmet challenges in education
Education: Application Process for Strategic Grants

Outreach to Program Officers (Mary Seawell and Ana Soler)
- Program officers are eager to hear about evolving opportunities
- Send an email
- Submit an inquiry via online form
- Call to introduce your organization or talk through your idea

Define the Project & Submit Application
- Back and forth process; may take 2-6 months
- Define learning questions, goals, project milestones, impact indicators
- Rolling deadlines (Feb., April, July, Oct.); time-sensitive proposals may be fast-tracked

Gates Board Decision & Grant Agreement
- Decisions at meetings in April, June, September, December
- Notification, grant contracts signed, funds released
- Ongoing communication w/program officer
- Interim and final reports
We invest in capital projects because we believe that land and facilities are long-term assets that can help nonprofit and community organizations serve Colorado communities.

We support capital projects that:

- serve a majority of low-income students
- build or improve education facilities that will be heavily used by a majority of the community
- increase access to education in rural areas
- provide learning opportunities for a broad audience

Funding examples:

- charter schools seeking matching funds for a BEST grant
- rural schools improving an auditorium or athletic field for community use
- early childhood education centers
- GED, literacy, or vocational training centers
Capital Grants for Education

Outreach to Program Officers
(Mary Seawell, Ana Soler or Lisa Rucker)

- Send an email
- Submit an inquiry via online form
- Call to talk through your idea

Submit Application

- Use the Colorado Capital Common Grant Application
- Proposal deadlines: March 15 and September 15
- See full at details at: www.gatesfamilyfoundation.org/how-to-apply

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Impact Investments for Education

Program-Related Investments
Specific to Colorado; align with strategic priorities; below-market commitments of capital (loans/ guarantees); need a clear source of repayment – ex: Colorado Charter Facility Solutions

Mission-Related Investments
Investments within the Foundation's portfolio; market-rate returns; investing in innovation in the sector – example: education technology funds

Process: PRIs often initiated through contact with program staff – contact Mary
MRIs are part of the investment management process – contact Sue or Tom
Questions From The Community

- Does your Foundation-level commitment to advancing equity mean you expect to fund more BIPOC-led organizations?
- How will your focus on climate change impact priorities in your education program (and others)?
- Do you have a preference for ongoing program versus shorter-term projects?

*Please view the last 15-20 minutes of the video for answers!*
What’s Next?
Open Opportunities

- We're searching for a new Program Officer for Natural Resources.

- Public officials can apply by March 4 for a Gates Fellowship to attend Harvard this summer.

- Our next deadline to apply for a capital grant is March 15.
What’s Next? Learn More

NEXT WEBINARS:

- Community Development (March 1, Noon to 1 p.m. MT)
- Natural Resources (March 2, Noon to 1 p.m. MT)
- Informed Communities (March 3, Noon to 1 p.m. MT)
- Impact Investments (March 14, Noon to 1 p.m. MT)

EDUCATION QUESTIONS/INQUIRIES

Mary Seawell, Senior Vice President
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Ana Soler, Senior Program Officer
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Thank You

Let's keep the conversation going.
With your partnership, we amplify our impact.