

CHAMPIONING AFRICAN VISIONARIES



Strategic Plan 2024-2026



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Segal Family Foundation's vision is to build the most influential development network in Sub-Saharan Africa, with proximate visionaries at the helm so that they are the drivers of change on the continent. We believe that locally-led development is more sustainable, more impactful, and more just. In practice this means we will achieve several key outcomes over the next three years:

Drive resources to African visionaries

- Provide \$47.5m in unrestricted grant funding and Active Partnership support to a portfolio of 250-300 exemplary organizations across Africa
- Leverage an additional \$120m from other funders towards these same partners
- Exceed \$167.5m as the total amount of value driven to partners (grants + AP + leveraged funding) for a return on investment of 3.0x¹

Build the Segal Family Foundation community across Sub-Saharan Africa

- Build a robust Luminary Circle with over one hundred active members, in which both Luminaries and Segal Family Foundation derive substantial value
- Support the creation of sectoral or geographical partner coalitions so that groups of visionaries can speak and act collectively with more power

Build a movement of equitable philanthropists across the world

- Develop Segal Family Foundation's philanthropic advisory services to meet the needs of funders everywhere, including funders relevant to the work of our sister foundations, Focus for Health and Focus Central America
- Build an evidence base to support our model and philosophy and disseminate it through high-value platforms

Support Segal Family Foundation's long-term sustainability

- Budget and execute our work carefully to preserve our resources while raising outside funding to support our work

¹ROI of 3.0 based on a total budget of \$56.25m over three years.



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SFF Does Things Differently

Since the inception of Segal Family Foundation (SFF), Barry's desire to *fight for the little guys* has inspired an organizational culture that champions good ideas and quality talent over inflexible bureaucratic systems. Our commitment to serving our partners and avoiding the common missteps of "business as usual" led us on a long journey that most funders have never walked: localizing much of our grantmaking process to the hub level and rooting our strategy in the contextual expertise of our in-country staff. Our grantee portfolio is now 87% locally-led, our grantmaking team is fully based in the countries they serve, our advisory board has expanded to include two more African partners, and we are now the second most prolific funder in Sub-Saharan Africa². While many family foundations

start out with lofty ambitions to do things differently, SFF is actually walking the walk. We celebrate Africa. We champion African leaders. We want African ingenuity to get the financial backing it deserves, and we want to lead the way for other foundations.

INNOVATION & INFLUENCE

SFF was founded around the idea that our resources could offer something new to the philanthropic sector—specifically high trust, low-headache grantmaking. As we learned more about the persistent gaps in global funding and the challenges local visionaries faced, we took on the challenge of experimenting with new programs to help knock down the roadblocks barring our partners from success.

In Burundi in 2013, our team theorized

that bringing cohorts of local leaders together for professional support and community building would help build a robust network of donors and doers united for a common cause. Cut to 2023, after a decade of refining our incubator programming, a robust network of peer programs is finally taking root in our countries of operation, allowing us to share the load and set our sights on the next wave of innovation.

In 2017, an analysis of our partner growth data revealed that our foreign-led partners were rapidly out-fundraising their African-led peers. This led us to design and launch the African Visionary Fellowship. This flagship program delivers tailored support to African leaders, as well as a platform to elevate the most promising partners in our portfolio. A few years later,

² (COF p.72).



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we went a step further by establishing a fund to channel additional philanthropic support to these exemplary organizations. We hoped these efforts would help correct the fundraising inequity seen within our portfolio. We could not have foreseen that just a few years later, we would be working closely with like-minded funders—from Dovetail Foundation to Issroff Family Foundation—that have adopted many of the same principles and practices. Still further, the African Visionary Fund—born within SFF, yet come to fruition as an independent entity—is now driving additional resources to organizations on the continent.

Over the past 15 years, each of our experiments has made us stronger, wiser, and bolder. Over time, SFF has become known as a sophisticated innovator with a robust reputation to maintain and, ideally, build upon. Out of a crowd of peer organizations, SFF is uniquely suited to curate catalytic connections between donors and doers.

COMMUNITY TRUMPS COMPETITION

When Barry first visited Africa, he saw that many visionary leaders were doing similar work. He theorized that by gathering like-minded people together, SFF could foster a community that was greater than the sum of its parts. In the end, change happens faster when we're all in it together, and SFF's people-focused approach is one of the key features that sets us apart from our peers.

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We remain committed to building this community of peers in whatever form supports our partners best. African leaders have all the bold ideas and big visions necessary to transform civil society; what they need is equitable financial backing and a spotlight to thrive in. Global funders understand that locally-led giving is more ethical, and they're learning that it's more effective. What they need is the practical know-how to find and fund visionary local leaders. Bridging this gap is where SFF thrives.

We celebrate Africa. We champion African leaders.
We want African ingenuity to get the financial backing it deserves,
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The Context of SFF's Work

LANDSCAPE ANALYSIS

Africa has been experiencing rapid economic growth over the past two decades thanks to a large youthful population, relative peace, improvements in governance, democratization, and favorable business environments. This growth is felt in increased urbanization, infrastructure development, rising incomes, and rising consumer spending driven by the emerging middle class. Africa is expected to continue on a robust economic growth path over the long term as the effects of the COVID pandemic and global commodity price shocks dissipate.

It is also true that the benefits of this growth are unevenly distributed. Amid pockets of prosperity, millions of Africans are contending with deepening poverty and growing income and wealth inequalities. According to [UNECA](#), the

COVID pandemic pushed 62 million non-poor Africans into poverty, and half of the continent's population lives below the poverty line. Development and democracy are failing to deliver essential services and social safety nets to the most vulnerable as economies struggle to create adequate jobs for the growing number of youth entering the labor markets yearly. In some countries, we are witnessing a sliding back to authoritarian leaders using development rhetoric as a cover to reign-in civil society, claw back democratic freedoms, and repress marginalized and dissenting voices.

Technology has been a driving force for social transformation, innovation, and investment on the continent. A prime example is the mobile phone revolution which has transformed financial services and financial inclusion for millions.

Africa's youth dividend has tremendous potential to leverage this tech boom and revolutionize other sectors ripe for digital transformation. Also linked to globalization is the growing influence of informal and non-state actors such as extremist groups, who are shaping new geopolitical dynamics and fueling long-existing conflicts across Africa.

Meanwhile, African nations have articulated a clear desire to be seen as equal global trading partners, rather than beneficiaries of development aid. This is directly reflected in the growth of social entrepreneurs innovating new solutions to ingrained development challenges. Global conversations on the power dynamics in the aid sector have also led to a strong push for the localization of the aid industry. This will lead to shifts in decision centers across the aid sector in the next few years



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and potentially drive more resources to local civil society actors in Africa.

Like other regions in the Global South, Africa is already at the front line of the climate crisis. According to the [Global Centre for Climate Mobility](#), climate-related disasters have impacted over 337 million people across Africa over the past two decades, stretching African governments' already tried capacities to reach and support those affected with social services, especially in emergencies. We need to prioritize development strategies to reduce the vulnerability of households and communities and improve their capacity to cope and adapt their livelihoods in the face of worsening climate conditions.

OUR RESPONSE

SFF will remain relevant and responsive to the trends shaping lives across the continent. We will back tried and tested models and also bet big on innovators

championing bold new approaches that reflect Africa's entrepreneurial spirit. As ever, maintaining a robust and well-connected local team is central to our ability to navigate nuanced and evolving contexts. Looking forward, our grantmaking will focus on furthering the following six outcomes which reflect the most important realities, challenges, hopes, and opportunities for Africa and its people, and fall within our sectoral focus of Health, Education, and Livelihoods.

Improved outcomes for children and families: We will continue to strengthen households and provide children with nurturing care, protection, play, early learning, and the nutrition they need to build strong foundations. This also entails supporting children who have had adverse experiences, for instance, orphans, children in the protection system, those who have dropped out

of school, homeless children, and those who have undergone traumatic experiences to recover and live their full potential.

Dignified employment and economic opportunity: We will support initiatives bridging labor market demand and supply gaps in our focus countries. We will invest in programs that skill the youth for dignified employment and livelihoods in both existing sectors and emerging markets.

Quality education and learning outcomes: We will support efforts to improve access to educational opportunities for learners from marginalized communities and disadvantaged backgrounds. We will also support innovators working with school systems to improve the quality of learning and help students build critical



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21st century skills such as digital literacy, soft skills, and leadership for success in work and life.

Health access and equity: We will continue improving access to quality healthcare for all. We will support healthcare providers filling critical gaps in underserved areas. We will also support innovators tackling the wide array of related issues that directly affect health outcomes. In particular, there is significant need for investment in the ever-increasing non-communicable disease burden in Africa including cancers, mental health, diabetes, and hypertension.

Community-driven development: We will continue investing in community development organizations scaling wide and deep to meet various community needs holistically. We'll also continue

supporting community-driven economic empowerment models that help communities to improve their economic productivity, access financing, build wealth, and lift their families out of poverty.

Inclusive futures: This cross-cutting area will enable SFF to keep inclusion at the forefront of our programs by ensuring that marginalized and minoritized populations across Africa, such as underserved rural and indigenous communities, women and girls, persons with disabilities, and sexual and gender minorities, are considered in our grantmaking and given equitable access to socioeconomic opportunities, dignity, and agency.

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Importantly, we will build a climate-conscious portfolio by integrating solutions to the climate crisis across all areas of our work, for instance, by reaching younger generations with knowledge of climate change and its impacts, facilitating our partners to adopt population, health, and the environment (PHE) approaches marrying social development with efforts to conserve/restore nature; supporting climate-smart social enterprises and green livelihoods; and supporting vulnerable groups and communities to build resilience, adapt their livelihoods and cope with natural disasters. Internally, we will continue to reflect on our carbon footprint and the actions we can take as a foundation to contribute to the global effort to lessen carbon emissions.



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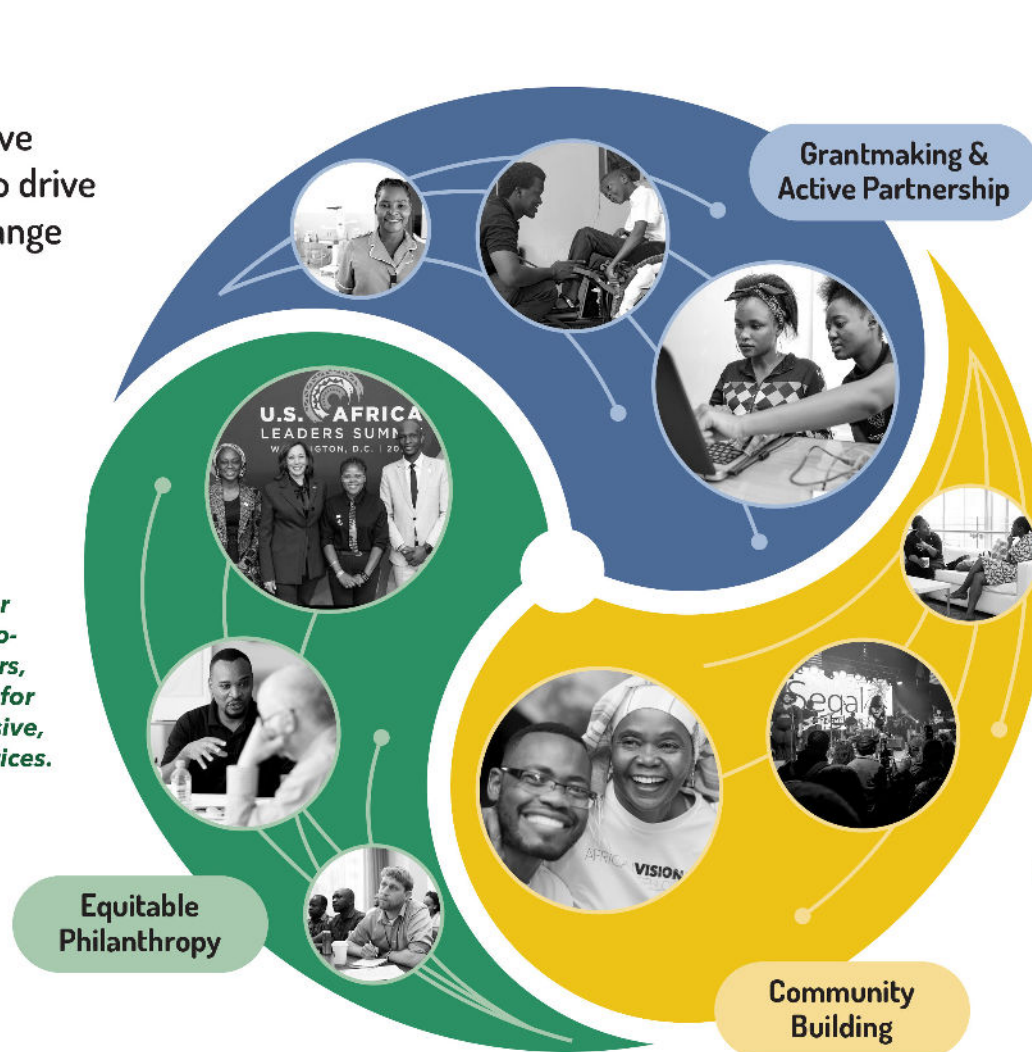
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African changemakers have the resources and networks to drive positive, transformative change for their communities.

3
By sharing insights from our work with fellow funders and co-producing knowledge with partners, we build evidence and support for local solutions and inclusive, grantee-centric practices.



1
We identify, invest in, and creatively support visionary local leaders and organizations tackling development challenges and opportunities in Africa—and help progressive donors do the same.

2
We connect our partners to a vibrant network of peer organizations and like-minded funders to share knowledge, experiences, and resources for greater impact.



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Grantmaking & Active Partnership

We identify, invest in, and creatively support visionary local leaders and organizations tackling development challenges and opportunities in Africa—and help progressive donors do the same.

IDENTIFY

We identify early-stage African visionaries and bold organizations with huge potential to transform society.

INVEST

We fund local leaders and organizations working alongside their communities, and our grantmaking is guided by equitable, grantee-centric approaches, including unrestricted grants.

ACCOMPANY

We learn alongside our grantee and funder partners, co-creating tools and resources to support adaptation, growth, and knowledge exchange.

ACCOMPANY

We accompany and nurture grantee partners, taking time to understand each one's vision, model, context and challenges, so that we can provide targeted support for their organizational development and community impact goals.

ACCOMPANY

We accompany funder partners, taking time to understand their grantmaking goals and needs, to provide tailored advisory services and insights.

AMPLIFY

We amplify our partners' work to help them access ideas, funding, and new networks—via online and social media.



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Community Building

We connect our partners to a vibrant network of peer organizations and like-minded funders to share knowledge, experiences, and resources for greater impact.

CONVENE

We create space and opportunity for dreamers, doers, and funders to collaborate, co-create, celebrate and inspire.

CONNECT

We leverage our trusted networks, local expertise, and partner insights to support meaningful connections, partnerships, and collaborations.



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Equitable Philanthropy

By sharing insights from our work with fellow funders and co-producing knowledge with partners, we build evidence and support for local solutions and inclusive, grantee-centric practices.

INFORM

We share insights from our work with 400+ grantee partners, and from the expertise of our locally-based grantmaking teams and advisors.

INFLUENCE

We promote trust-based and grantee-centric practice, learning and evidence, alongside progressive funders and funder coalitions globally.



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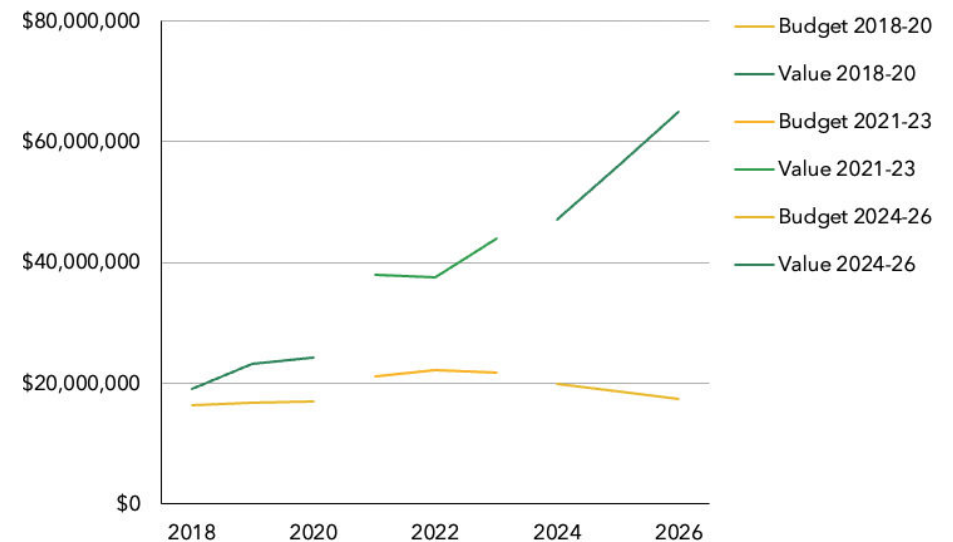
Pillar 1: Driving Resources to Visionaries

OVERVIEW

Funding is oxygen for our partners and grantmaking will always be our core business and the lion's share of our time and treasure. Our own resources, though, are not sufficient to meet our partners' needs so we endeavor to influence and channel the resources of others. Between 2024-2026 we will:

- Provide \$47.5m in unrestricted grant funding and Active Partnership support to a portfolio of 225-350 exemplary organizations across Africa.
- Leverage an additional \$120m from other funders towards these same partners.
- Exceed \$167.5m as the total amount of value driven to partners (grants + AP + leveraged funding) for a return on investment of 3.0x.
- Incorporate social enterprises and impact investors more fully into our community via our newly developed Debt Facility. It is administered by long-standing SFF partner, [Shona](#), operates at low cost to SFF, and will be largely self-sustaining as it grows.

Budget vs. Value Over Time





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IMPACT

We want to measure our partners' organizational growth and social impact.

- Partner revenue growth over time
- Partner progress against stages of development described in the Partner Journey
- Growth in social impact as defined by partners and coded and aggregated by SFF
- Participation in trainings and use of capacity building resources

Between 2024-2026,
the total value driven to partners
will exceed **\$167.5m** for a return
on investment of **3x**.

VISIONARY PROFILE

How Segal Family Foundation Selects New Partners

SFF's core business is grantmaking to extraordinary organizations: our visionary partners. We select new partners based on their demonstrated potential to sustainably improve the welfare of communities in Sub-Saharan Africa. In addition, we look for organizations that can contribute to our growing network by serving as a model or resource for our partners.

Basic eligibility criteria

The following criteria, having served us well for the past five years, are used to identify potential partners for consideration. (Note that not all criteria are binding.)

- **PROXIMATE TO THE ISSUES AND THOSE SERVED:** Carries out its work locally. Is led by people of that community or people with a deep connection to the issues the organization is working on. We do not support local offices or affiliates of national and international organizations.
- **SOCIAL BENEFIT:** Their work improves the quality of life and access to opportunities for individuals and families and contributes to healthy and prosperous communities.



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- **COMMUNITY OR CLIENT-DRIVEN:** Should serve their community or clients directly, and get meaningful involvement, input, and support from their community and clients in programs. The organization's strategies should engage their community or clients in their own development rather than as passive beneficiaries.
- **EARLY STAGE:** Should be a small organization that is early in its development and has not received support from many domestic or international funders. The vast majority of new partners are considered Discovery or Acceleration Phase organizations, according to our Partner Journey, and have budgets of less than \$500,000.
- **CAPABLE MANAGEMENT AND CAPACITY TO DELIVER ON PROGRAMS:** Should have at least two years of operations, paid staff, and demonstrated capacity to manage and execute programs. (This criterion is not a "must-have" if we have enough familiarity with the organization to feel confident in their ability to execute). The organization's governance, operations, functional management, and control systems, however basic, should demonstrate a commitment to ethical leadership and good stewardship. We do not provide funding to create new organizations.

- **LEGAL STATUS:** Should be legally registered in the country of operation as an organization whose purpose is to promote social impact, public benefit, or social welfare.

Selection guidelines

In addition to the criteria above, we use the following guidelines to select local organizations that are truly visionary:

- **CLEAR VISION:** Has an informed, root-cause understanding of the challenge it seeks to address in its community and how to go about addressing it. The clarity and focus of vision may vary according to the organization's stage of maturity. However, there should be some consistency in the issues the organization takes on over time.
- **VISIONARY LEADERSHIP AND GOVERNANCE:** Is guided by passionate, dynamic, and committed leadership who can inspire the team and grow the organization's resources and support base. The organization is continually building leadership and mechanisms of accountability from within its own constituency.
- **A FOCUS ON THE UNDERSERVED:** Reaches underserved communities and clients, especially those who are marginalized from services and support or are hard to reach.



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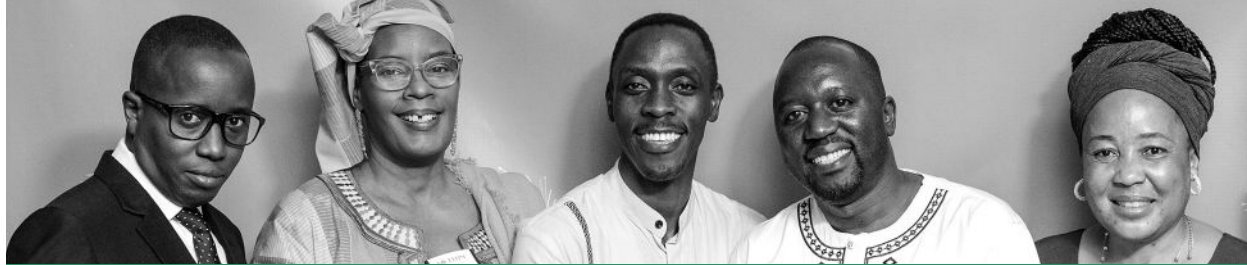
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- **EFFECTIVE:** Can demonstrate that its work has the potential to improve the lives of the constituencies they serve.
- **REPUTATION:** Sees itself as part of a larger movement for change and works toward building communities and partnerships to build power and influence. It is recognized and trusted by peers, partners, and the communities it serves.
- **BOLD:** Has the ambition to grow its impact. It continuously seeks ways to: expand its reach and partnerships; go deeper with new products and services; and/or generate programming models and methods that can be adapted to address similar challenges in other communities.
- **A LEARNING ORGANIZATION:** Are committed to collecting data and information to improve the quality, efficiency, and effectiveness of programs and services. It wants to know if the desired goals are being met and is willing to change course when things are not working. It is also open to exchanging knowledge and resources with other partners in the SFF community, as well as the people it serves.
- **POTENTIAL FOR STABILITY:** Is able to identify additional sources to support its work. It is committed to building a capable team and leadership bench and governance that will ensure the continuity of the organization's vision, programs, and operations in the face of major changes.
- **STRATEGIC FIT:** SFF focuses the majority of its support on organizations working in the Education, Health, and Livelihoods sectors. Within these broad categories, there is rich and contextual variation across our hubs. The organization's sector focus and geographic location should correspond with the stated foci of a particular hub's strategy.

Special Cases

We will consider organizations that fall outside of our core sectoral focus if they offer tremendous promise to improve the welfare of communities in Sub-Saharan Africa. These outliers should not account for more than 10% of our new partners each year.



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Segal Family Foundation PARTNER JOURNEY



WHY THIS IS IMPORTANT

We are a small, bold foundation that shares in the belief that more open and accountable philanthropy is the best kind of philanthropy. Being transparent not only on *what* and *who* we support, but also on *how* we do it strengthens our credibility and standing among our peers. Clear communication on what we expect from our grantee-partners, and what they can expect of us during their funding journey with Segal Family Foundation deepens trust, mutual-accountability, and contributes to stronger relationships with the organizations we support and the communities they serve.

A VISUALIZATION OF THE SEGAL PARTNER JOURNEY

In general, Segal Family Foundation seeks to establish long-term partnerships with visionary organizations across Sub-Saharan Africa. Our team uses our visionary criteria to identify new partners and we use our Active Partnership model to support them while they are in our portfolio. Our goal during this journey is to see our grantee-partners become stronger, healthier organizations, increase their social impact, and be in a position to sustain their efforts long after Segal support ceases. To be clear, the Partner Journey is an illustrative set of descriptions and milestones, not an exact pathway for individual partners to progress along.

During the partnership, an organization may receive financial support for a maximum of eight years from Segal. This is subject to their stage of maturity (growth phase) when they join the portfolio; and their year-to-year growth monitored through our due diligence process. Thereafter, high-performing Segal Family Foundation alumni partners are invited to join our Luminary Circle—an initiative that recognizes and celebrates Segal alumni partners whose hard work and commitment has driven Segal Family Foundation's mission and strengthened our community over the years. Partners can remain in the Luminary Circle for several years if they continue to demonstrate their commitment to our community.

The partner journey comprises four phases whose objectives are elaborated in the following table:

GROWTH PHASE	DISCOVERY PHASE	ACCELERATION PHASE	MATURE PARTNER	LUMINARY
YEARS OF FUNDING REMAINING	5 to 8 years remaining	2 to 4 years remaining	0 to 1 years remaining	No funding at this stage
YEARS WITH SFF* (if the partner joined at Discovery Phase)	Year 1 to 3 of funding	Year 4 to 6 of funding	Year 7 to 8 of funding	Year 9 onwards (without funding)



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GROWTH PHASE	DISCOVERY PHASE	ACCELERATION PHASE	MATURE PARTNER	LUMINARY
BUDGET SIZE	\$0 - \$200k	\$200k - \$500k	\$500k - \$1m	\$1m +
WHAT THE ORGANIZATION LOOKS LIKE	<ul style="list-style-type: none"> - Early-stage, led by a passionate founder - A few staff and volunteers playing multiple roles - Some great work with positive results. Committed to doing more for their community(ies) - Other kinds of leadership are beginning to emerge in the organization beyond the founder - Nascent internal systems. A few may be in place for compliance or to meet funder requirements. - They have a relatively small budget and few institutional funders apart from Segal Family Foundation. 	<ul style="list-style-type: none"> - Making progress on improving internal systems, clearer role definition and specialization - Growing and taking on new projects and programs - Consolidation and innovation in programs - Experimentation with new funders and partners - Vision, power and authority shared among founders, the team of staff and governance structure (e.g. board) - Aspiring for greater impact beyond its immediate community, perhaps systems level change 	<ul style="list-style-type: none"> - Established leadership and systems in the organization - Starting to have broader influence and are sought out as a partner or thought leader by key stakeholders - Have scaled or expanded their model with success - Dealing with internal changes and transitions: old and new voices in the team and board - The established leaders have been around for a long time. Some are retiring and moving on, necessitating new leadership. - Established relationships with major funders and organizations 	<ul style="list-style-type: none"> - Has received financial support from Segal for eight years, triggering a phased off-ramp and graduation, and/or - They have achieved an annual budget of over \$2 million, and/or - Segal funding ceases to be catalytic to the organization's growth or impact. - Are sufficiently funded by other donors to enable them to continue experimenting and taking big bets
SFF TEAM GOALS	<ul style="list-style-type: none"> - Getting to know the leader, the vision of the organization, and their program model - Expectation setting - Understanding organization's health, internal strengths and capacity gaps - Assessing their potential for growth and impact 	<ul style="list-style-type: none"> - Understanding what growth means for the partner and its pathway to growth and scale - Supporting partner to build an evidence-base to demonstrate their impact - Supporting organization to better document and communicate its work to other funders and stakeholders 	<ul style="list-style-type: none"> - Sustainability - Change management - Leveraging / focus of donor engagement - Handover to scale-focused funders - Enable them to build an evidence base and communicate their impact - Tapping into partners' expertise to benefit the larger Segal Family Foundation community 	<ul style="list-style-type: none"> - Light touch engagement - Handover to big scale-focused funders - Tapping into expertise to benefit the larger Segal Family Foundation community



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GROWTH PHASE	DISCOVERY PHASE	ACCELERATION PHASE	MATURE PARTNER	LUMINARY
PARTNER GOALS	<ul style="list-style-type: none"> - Orientation to Segal Family Foundation's philosophy and community - Demonstrating capacity to learn and grow its social impact 	<ul style="list-style-type: none"> - Organizational growth and impact acceleration - Leveraging financial and technical support through Segal community of partners and donor friends 	<ul style="list-style-type: none"> - Clarity on the model and end game - Sustainability - Leveraging financial and technical support through the Segal Family Foundation community of partners and donor friends 	<ul style="list-style-type: none"> - Leveraging financial support through Segal Family Foundation community of partners and donor friends - Benefiting from a community of peers at a similar stage
RELATIONSHIP WITH SEGAL	<ul style="list-style-type: none"> - Starter grant (in the \$10k - \$30k range). As a principle, we stay within 30% of their budget. - New Partner Orientation meeting - Office hours and multiple touch points with program officer / associate - Open resource credits - Organizational Capacity Assessment (OCAT) and financial health check - Preparing them for their first AGM - Supporting them to strengthen internal systems: Safeguarding, beneficiary accountability, finance, operations 	<ul style="list-style-type: none"> - Increased yearly commitment for high performing partners (Not to exceed \$75k per year) - Partner is eligible for multi-year grant commitments - Impact evaluation support - Possible enrollment in the African Visionary Fellowship (a program combining individual leadership coaching, targeted organizational technical assistance within a curated cohort of fellow Segal partners, and increased promotion by Segal's Equitable Giving team) - Organizational Capacity Assessment and health checks - Participating fully at our AGM and AVF-related events (if eligible) 	<ul style="list-style-type: none"> - Decreased yearly commitment in preparation for phased off ramp and graduation into Luminary Circle - Light touch diligence - Linking them up with younger partners for mentorship and support - Sharing their knowledge and experience at our AGM and other Segal Family Foundation events 	<ul style="list-style-type: none"> - Promotion by Segal's Equitable Giving team - Linking them up with younger partners for mentorship and support - Invitation to AGM and other Segal Family Foundation events



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GROWTH PHASE	DISCOVERY PHASE	ACCELERATION PHASE	MATURE PARTNER	LUMINARY
WHAT WE ARE WATCHING YEAR TO YEAR	<ul style="list-style-type: none"> - Effectiveness: ability to achieve set milestones - Leadership: demonstrated commitment to building an organization for the long-term - Growth Mindset: demonstrated desire to learn, improve organizational health and grow their impact - Financial Management Systems: financial accountability and improvement of financial management systems - Safeguarding: the organization has appropriate policies and measures in place to protect staff, children, and vulnerable adults in their programs from abuse and harm. - Community Building: demonstrated interest to participate in the Segal community e.g. they are growing their partnerships with peer organizations and are utilizing Segal AP resources 	<ul style="list-style-type: none"> - Growth Strategy: development/ refinement of a clear strategy for responsible and meaningful growth - Program Growth: expansion/ deepening of services and/or programs - Impact & Measurement: refinement/sophistication of M&E systems - Fundraising: increase in funding partnerships and development/ refine of a fundraising strategy - Communications & Marketing: strengthened communications and marketing, and increased visibility - Governance: the organization has strong governance systems demonstrated by an effective board and necessary policies and procedures in place to help the board of directors carry out its governance and fiduciary responsibilities 	<ul style="list-style-type: none"> - Organizational Health: demonstrated stability of operations, teams and leadership. - Learning: ability to be dynamic, and find ways to remain relevant and impactful as the organization grows - Community Building: demonstrated contribution to the Segal Family Foundation community and mentorship of younger partners - Fundraising: diversification of funding and reduced dependency on Segal Family Foundation 	<ul style="list-style-type: none"> - Credibility: Segal Family Foundation has confidence in their effectiveness and the relevance of their work - Community Building: demonstrated contribution to the Segal Family Foundation community and mentorship of younger partners - Fundraising: diversification of funding and reduced dependency on Segal Family Foundation



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WHAT IS THE TYPICAL NEW PARTNER PROFILE?

Our team selects new partners using our Visionary Criteria and Hub strategies

- Approximately 20-35% of our new partners join the portfolio at Discovery Phase. These partners will have an expected journey of approximately eight years.
- Approximately 60-70% of our new partners join the portfolio at Acceleration Phase. These partners will have an expected journey of approximately five years.
- Approximately 5-10% of our new partners join the portfolio at Mature Stage. They will be special cases identified as strategic partnerships or special opportunities. These partners will have an expected journey of approximately two years.

WHAT IS THE GRADUATION PROCESS?

Once a partner joins the portfolio, program officers will use our annual due diligence process to review year-to-year performance of an organization and inform grant renewal decisions for that partner organization. There are three key checkpoints within the partner journey that will inform the duration of the partnership and graduation timeline:

- **Discovery Partners:** The maximum partnership duration for partners entering at the Discovery Phase is eight years. Following an initial three years of funding, low-performing partners who are not successfully progressing along the partner journey will be prematurely graduated from the portfolio. These partners will not be eligible for the Luminary Circle.

- **Acceleration Partners:** The average partnership duration for partners entering at the Acceleration Phase is five years. Partners who are in their third year of funding in the Acceleration Phase that have demonstrated a pattern of poor performance will be reviewed for early graduation. Some select partners will be eligible for the Luminary Circle.
- **Mature Partners:** Partners who have continued to demonstrate high performance as outlined in the typical partner journey and/or have received eight years of funding will be eligible for our Luminary Circle.

WHAT HAPPENS AFTER GRADUATION?

- Grantee-partner joins our Luminary Circle where they are expected to actively contribute and give back to our community through mentorship and support to younger Segal Family Foundation partners
- Grantee-partner continues to be invited to the Annual Meeting
- They continue to attend in-country workshops and networking events
- We continue to vouch for their work, recommend them to other funder friends, write letters of recommendation, etc.

WHAT CIRCUMSTANCES MIGHT LEAD TO THE JOURNEY ENDING PREMATURELY?

The primary factor in how long a partner is funded will be the maturity on entry. Within our typical partner journey there are some exceptional circumstances that may trigger an accelerated offramp.

- Financial fraud: We have no faith in the organization's financial integrity.
- Organization behaves in ways that violate Segal Family Foundation's ethical values and Code of Conduct.
- A pattern of poor performance against set milestones and no progress year to year.
- The organization causes harm to beneficiaries and shows no commitment to learning from its mistakes.
- There's a significant change in Segal Family Foundation or the partner's priorities such that we are no longer aligned.
- Organization has achieved an annual budget of over \$2 million, and/or Segal Family Foundation funding ceases to be catalytic to the organization's growth or impact.



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HUB MODEL

Refining Our Model

Currently, each of SFF's five hubs has between 70-90 partners in its portfolio, to which is deployed between \$2.2-4.0m in grant funding each year, supplemented by approximately \$100k-200k in Active Partnership programming. The idea is that every SFF partner gets what they need to evolve their work—capital, capacity, connections, and community—based on their stage of maturity and specific context.

Our primary goal is to safeguard the SFF partner promise of high-touch and high-value partner relationships and also ensure that partners are equipped to thrive at the end of their journey with us. To that end, our next iteration of the hub model will likely retain a great deal of content from our current model, with specific areas of change to account for the evolution of SFF over the past few years.

Sourcing Partners

New partners have come from a tried-and-true system of network referrals, made possible by our large network of community connections within our countries of operation. Historically, the most common referral sources include:

- Current partners
- Hub advisory committee members
- Peer incubators
- Peer funders

The second avenue for sourcing partners has been our own Social Impact Incubators. Approximately 13% of our new partners in 2021-2022 were SII alums. Sourcing partners via SII is most useful within countries with low exposure to funders and a weak ecosystem for supporting local visionaries. Fortunately, many of our hub ecosystems have grown in the years since we launched our SIIs. Currently, we have no SII cohorts operating, but we will continue to use this approach strategically when entering new geographies or responding to changes in current countries of operation.

We anticipate continuing to source new partners through these two avenues (external referrals and SIIs) going forward.

New Partner Maturity

In order to maintain a sustainable portfolio turnover, we will be bringing partners into the portfolio at a more diverse range of maturity than in the past three years. Per our Partner Journey, new partners will follow the following trends:

- Approximately 20%-35% of our new partners join the portfolio at Discovery Phase. These partners will have an expected journey of approximately eight years.



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- Approximately 60%-70% of our new partners join the portfolio at Acceleration Phase. These partners will have an expected journey of approximately five years.
- Approximately 5%-10% of our new partners join the portfolio at Mature Stage. They will be special cases identified as strategic partnerships or special opportunities. These partners will have an expected journey of approximately two years.

Staffing

For the last four years, we have scaled the portfolio substantially, growing our portfolio from 231 partners in 2019 to 385 in 2022 (a 67% increase). Meanwhile, our Programs Team has lagged behind portfolio growth, growing by only 11% since 2019. The accelerated portfolio growth in recent years has led to a slightly less attentive treatment for newer partners, as was reflected in the 2023 Grantee Perception report³. Reflecting on this trend, both board and staff have expressed concern that the current number of partners per Program Officer exceeds our ability to deliver our desired level of hands-on support.

Currently, we have an average of 43 partners per Program Officer⁴. Input from the Programs Team indicates that a healthier ratio would be approximately 25-30 partners per program officer, with variability based on each hub's particular circumstances, staff composition, and strategic goals. Tracking this ratio as a key

performance indicator will fuel our desire to have high-touch relationships with partners. It also reduces pressure on staff bandwidth.

At the country level, we have a well-established and tested hub staffing model in which two or more hub Program Officers work together to manage their portfolio, devise and execute AP, and oversee any consulting engagements. Having two full-time Program Officers per hub creates useful continuity of care for partners when either teammate is unavailable, allows for a more equitable distribution of tasks based on strength and interest, and ensures stability in the event of departures.

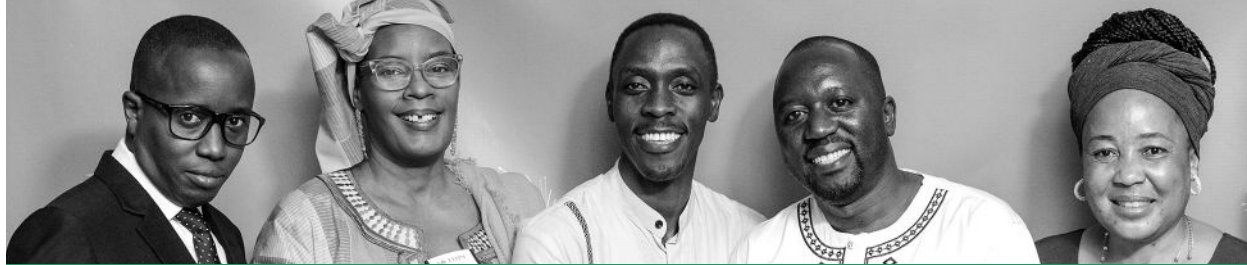
Slowing new partner acquisition will allow Program Officers to spend more time delivering AP services to our current portfolio, with less time devoted to sourcing new partners. In this way, we can continue to deliver the kind of high-touch, attentive support associated with SII and AVF to all partners throughout their journey.

Portfolio Size

Assuming our partners' tenure as grantees of SFF is five to six years on average, we will need cohorts of approximately 25 new partners each year to maintain hub portfolios of ~50-60 organizations per

³ 2023 GPR, p. 39.

⁴ For reference, our 2018 Grantee Perception Report found that the average Program Officer portfolio among our peers is 33:1.



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hub. This is taking into account attrition due to poor performance and early graduation.

Active Partnership

Active Partnership (AP) at SFF encompasses all of the non-grant support we offer to partners. This support comes from across the SFF team and includes the African Visionary Fellowship, one-on-one office hours with Program Officers, safeguarding support, open resource credits, funding and connections to work with industry experts, donor connections, and a variety of promotions. Over ten years of experience led us to a general framework for the AP needs of partners at different stages of growth. Feedback derived from annual reporting and our [Grantee Perception Report](#) indicates that AP is consistently valued and well-received⁵. Our next three years of Active Partnership support will focus on responding to the priorities outlined by our partners and ensuring that they are adequately prepared to graduate from their partnership with SFF with the financial resources and organizational capacity to thrive. Successful partners will exit the SFF portfolio having grown to a budget of \$1m-2m, and having evolved in several crucial ways:

- Leadership: from one visionary supported by volunteer or untrained staff to a group of professionally-trained thought leaders supported by departments of focused staff

- Impact proposition: from a fuzzy notion of the change they seek (they may have a raw Theory of Change but probably don't call it that) to an organization with a solid evidence base demonstrating their worth
- Revenue base: from reliance on a single institutional funder and individual donors to a diverse and stable revenue base, underpinned by a clear strategy, strong development team, and a healthy pipeline

Funding Strategy

Program Officers will be tasked with bringing partners into the portfolio and graduating them within an average of five to six years. The relationships they develop with grantees are built on years of slowly-developed trust. Given that they are working most closely with the partners, they will lead the way in experimenting with new fundings strategies while working within the bounds of the partner journey, hub grant budgets, and the average aggregate lifetime support that most partners receive⁷. In general, this may involve placing some partners on accelerated funding schedules—theorizing that a large infusion of funding at the beginning of the partner journey may, in some cases, be more catalytic than several years of

⁵ Partners report that improved peer partnerships, improved leadership, and improved ability to fundraise are among the most significant changes to their organizations as a result of working with SFF. The desire for additional fundraising support was cited as the most common need. GPR, p.5.

⁶ Approximately \$200-350k in a 5-8-year journey



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smaller grants. This experimentation will be done on a case-by-case basis depending on the needs of the partner and their potential for rapid growth. Experimenting with this approach will offer program officers a wider array of tools to graduate partners in a state that feels just and in line with SFF's brand promise.

Once a partner no longer receives grant funding, they will very likely qualify to enter the [Luminary Circle](#). This designation signifies proven excellence, and we will be building awareness of this designation in the coming years. In terms of the value proposition, the Luminary Circle is fairly straightforward: members offer mentorship and connections to younger SFF partners. In return, SFF's Equitable Giving Team continues to promote their work, as appropriate, with our funder friends.

Pillar 2: Building Community

OVERVIEW

We want to build an inclusive community of actors working collaboratively to solve big, thorny development challenges in Africa. Inclusion means bringing together not just organizations we give money to, but also like-minded funders, forward-thinking governments, activists and artists, academics, and experts. We

have seen clearly the impact of synergies between individuals, organizations, and groups of such when they engage in safe, celebratory, and inspiring spaces.

IMPACT

We will look for outcomes in the quality, quantity, and value of network ties resulting from being part of SFF's community.

- Incidence of individual partner collaborations
 - Both those directly initiated by SFF and partner-driven
 - Focus on mentor-mentee relationships between Luminaries and early-stage partners
- Incidence of groups of partners working together, including:
 - Peer support networks like the Kenya Leadership Network
 - Fund-seeking partner coalitions like African Coalition for Social Impact in Uganda or the Cyclone Freddy *Tili Limodzi* Coalition in Malawi
 - Sector-wise communities of practice like our wellbeing and mental health partner groups

ACTIVITIES

Build the Luminary Circle

The Luminary Circle recognizes and celebrates Segal alumni partners whose hard work and commitment has driven SFF's mission and strengthened our community over the years. This initiative is



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designed to support our alumni to give back, pay it forward, and stay connected to SFF's mission. It will also spark peer learning and collaboration in ways that amplify the impact of our alumni beyond Segal Family Foundation. We will continue to refine the Circle around some basic parameters:

- Low barrier to entry. Any SFF partner in good standing at the conclusion of their grant relationship can become a member. If we have provided our own monetary support to an organization for ~eight years, it stands to reason that we would want to continue supporting them and involving them in our community.
- Non-financial support. Luminaries no longer receive grant funding from SFF but we believe that other forms of value will be derived from participation.
- Simple give and take. Members will offer mentorship and connections to younger SFF partners. In turn, they should expect to continue to be promoted by SFF with its funder peers and to be involved in our community-building efforts (AGM, country-level gatherings, newsletters, etc.).

Support partner coalitions

We will co-create, underwrite, and otherwise support groups of partners to form coalitions for the dual purposes of fundraising and learning. One challenge facing locally-led organizations is that most are too small to fit within many funders grantmaking

parameters. One possible remedy to this issue is to form groups of local organizations that collectively generate impact that is on par with larger expat-led entities. Such groups can spring up to meet a particular moment or campaign (e.g., disaster response or legislative reform) or have longer-term ambitions (e.g., sector affinity groups). We want to support any such constructs that have the following characteristics:

- Partner-led. We know from past experience that when SFF is the driving force beyond partner collaborations of any kind, it usually proves unsuccessful. If our partners are designing and executing, we don't want to support.
- Credible. Coalitions need to be transparent in their intentions, structure, and decision-making processes.
- Coherent. Coalitions need clear reasons for being—whether very specific sector-wise affinities or tackling a specific challenge.
- Action-oriented. Coalitions need to have real mechanisms for change.



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Pillar 3: Equitable Philanthropy

We are sophisticating our donor and impact investor engagement to drive more resources to our grantees and investees through various channels. This comes primarily in the form of a larger Equitable Giving Team, tasked with several objectives:

- Dramatically increasing our leveraged funding
- Experimenting with raising outside funding
- Supporting our partners to improve their own abilities to raise funds
- Building our philanthropic advisory services

IMPACT

In terms of measuring our impact, we will look for outcomes in peer funders funding local visionaries and adopting trust-based, grantee-centric practices (in other words, changes in funder knowledge, attitudes, and practices).

- Increase in proportion of international development funding to Sub-Saharan Africa that is directed to local organizations⁷
- Leveraged funding to our partners, with focus on:
 - Spreading it equitably across our portfolio
 - Unrestricted vs. restricted
 - Follow-on funding

- Other changes in specific funder practices or characteristics
 - % unrestricted funding⁸
 - % multiyear funding
 - % with staff based in Africa

91 Net Promoter Score
2023 Grantee Perception Report

Activities

The following table outlines some of the pathways we will employ to move resources to our partners:

⁷ For reference, "In the 2016-2019 period, roughly 13 percent of U.S. foundations' global grant dollars funded organizations headquartered in the countries where the work being supported will take place, up marginally from approximately 12 percent in the 2011-2015 period." (COF p. 55)

⁸ For reference, "U.S. foundations allocated 14 percent of their globally focused grant dollars as general or unrestricted support in the 2016-2019 period." (COF p. 51)



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SCENARIO	AUDIENCE (EXAMPLE)	PROS/CONS	LEVEL OF SFF EFFORT	POTENTIAL
1. Amplifying leveraged funding by brokering direct connections with funders to partners	<ol style="list-style-type: none"> Orgs new to international funding Big money Mega funders who don't want to cut small checks 	<ul style="list-style-type: none"> + SFF can control who gets grants - We can't plan for it and thus can't budget for it 	Medium Proactive recommendations, share due diligence, curated connections	5-10x SFF's own grants
2. Establishing new pathways—coalitions of partners or pooled funding	Foundations interested in a sector, theme, or humanitarian response (e.g., Cyclone Freddy coalition in Malawi \$150K from Vitol / \$20K from SFF)	<ul style="list-style-type: none"> + We can plan for it and budget for it - Requires us to have specific terms and conditions re: what money we'll take and how we will allocate 	High Reporting to funders, compliance and reporting to government impact measurement, administration	Substantial funding (read: tens of millions) to a) relieve pressure on the corpus and b) allow SFF to grow geographically
3. Help partners raise their own funds	All partners with specific resources or interventions available at specific points in the partner journey	<ul style="list-style-type: none"> + Ultimate form of sustainability - Fundraising depends more on connections/access than training 	Medium We already do this intensively through hub AP and AVF.	Infinite. Partners can utilize new knowledge and best practices forever.
4. Donor Advocacy via philanthropic advisory services	All funders (not limited to African-focused; not limited to private philanthropists); media	<ul style="list-style-type: none"> + We have a unique experience highly in demand - Crowded space. Many orgs are actively working on this 	Medium We can experiment with various tactics, e.g., Donor Salon, segalphilanthropies.org , etc.	100x SFF grants driven towards locally led organizations across the globe, including SFF, FCA, and FFH partners



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In order for SFF to accomplish the objectives outlined above, we must ensure the organization itself is strong and we are adequately resourced. SFF's strength has always lay with its people. Over the next three years, we will give attention to continuing to build an exemplary team—staff and board—to strategize and execute the vision.

RESOURCING PLAN

SFF will need approximately \$56.25m to execute its strategy over the three-year period of 2024-26. Over 80% of funds will be spent on grants made directly to partners and Active Partnership activities that yield direct value to partners.

In the worst case, 100% of this funding will come from SFF's corpus. However, we hope to raise approximately \$5m in outside funding to augment or reduce the draw from SFF's coffers with an eye towards bolstering the financial sustainability of the foundation to operate long-term.

MONITORING, EVALUATION, AND LEARNING PLAN

SFF is committed to ensuring that the foundation's next phase of growth and impact is propelled by data, knowledge, and intentional learning practices that will sustain continuous improvement and innovation in all areas of our work. We do this through a two-pronged approach:

1. On-going data collection and analysis from sources such as our partners' annual reporting to us and the information contained in our Slack channels and Salesforce files.
2. Periodic external evaluation conducted by third parties such as our Grantee Perception Reports and the evaluations of the Social Impact Incubators and the African Visionary Fellowship.

Key Performance Indicators

Grantmaking & Active Partnership: We want to measure our partners' organizational growth and social impact.

- Partner revenue growth over time
- Partner progress against stages of development described in the Partner Journey
- Growth in social impact as defined by partners and coded and aggregated by SFF
- Participation in trainings and use of capacity building resources



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Building Community: We will look for outcomes in the quality, quantity and value of network ties resulting from being part of SFF's community.

- Incidence of individual partner collaborations (both those directly initiated by SFF and partner-driven)
- Incidence of groups of partners working together, including peer support networks like the Kenya Leadership Network, formal fund-seeking coalitions like African Coalition for Social Impact in Uganda, and sector-wise communities of practice like our well-being and mental health partner groups

Equitable Philanthropy: We will look for outcomes in peer funders funding local visionaries and adopting trust-based, grantee-centric practices (in other words, changes in funder knowledge, attitudes, and practices).

- Increase in proportion of international development funding to Sub-Saharan Africa that is directed to local organizations⁹
- Leveraged funding to our partners, with focus on:
 - Spreading it equitably across our portfolio
 - Unrestricted vs. restricted
 - Follow-on funding

- Other changes in specific funder practices or characteristics
 - % unrestricted funding¹⁰
 - % multiyear funding
 - % with staff based in Africa

PEOPLE PLAN

There is widespread agreement across the team and among our peers that SFF has a unique culture that generates innovative, field-leading results. We recognize the importance of investing in and cultivating an environment that energizes our employees and connects them to one another, our wider community, and our mission. We will continue to put time and energy into building a team and workplace culture that will fuel SFF's future success.

⁹ For reference, "In the 2016-2019 period, roughly 13 percent of U.S. foundations' global grant dollars funded organizations headquartered in the countries where the work being supported will take place, up marginally from approximately 12 percent in the 2011-2015 period." (COF p. 55)

¹⁰ For reference, "U.S. foundations allocated 14 percent of their globally focused grant dollars as general or unrestricted support in the 2016-2019 period." (COF p. 51)



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A CULTURE OF EXCELLENCE

TALENT

We hire above-average talent with a focus on independent thinkers. We build an incentive-rich culture committed to excellence and retention.

CONNECTION

Building close relationships allows us to solve problems, align our priorities, and build lasting commitments that fuel our investment in SFF.

INNOVATION

We are explorers—unlocking new places, ways of thinking, and ways of doing.



LEADERSHIP

Talented teammates strengthen the next generation of SFF leaders and SFF peer organizations—and attract more new talent!

CONTEXTUAL EXPERTISE

Relying on contextual knowledge in the countries where we operate and the technical specialties of our team keeps us ahead of slow, process-heavy NGOs.

AGILITY

A highly talented and values-aligned team can act quickly with minimal structure. We are ahead of our peers because we are built for speed.



LOOKING AHEAD

Substantively shifting the approaches that Western funders employ in their African-focused philanthropy is the work of decades, not years. SFF itself is nearly two decades in existence and we are, only recently, gaining serious momentum as an influential actor in the philanthropy space. We know what our grantee partners need to succeed because they have told us and because we have witnessed remarkable growth and impact stories. We know what is required to build a resilient, dynamic organization to meet these needs. We need only to marshal adequate resources (our own and others) and continue attracting exemplary talent to execute. We expect to wrap up our next phase celebrating new heights of progress.

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APPENDICES

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- [2023 Grantee Perception Report](#)

Last updated February 2024