



2024

STRATEGIC PLANNING REPORT





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Background

CHINOOK FUND:

Mobilizing Resources for Grassroots Change in Colorado

Established in 1987, Chinook Fund was born from the collective vision of a group of young individuals endowed with intergenerational wealth. Motivated by the foundational principles of the Funding Exchange network, we were driven to support small, grassroots initiatives dedicated to peace, human rights, and social equity. From the outset, Chinook Fund has upheld a deep commitment to community accountability, which guided us to establish a community-led grantmaking committee and initiate our ongoing Giving Project.

Today, Chinook Fund remains steadfast in our mission to empower grassroots organizations at the forefront of racial, economic, disability, immigrant, and LGBTQ+ justice. Since 2016, we have primarily directed our funding through the Giving Project. This groundbreaking model, developed in collaboration with the Social Justice Fund NW and Resource Generation, blends political education, grassroots fundraising, and participatory grantmaking to transform community members into philanthropists and donor organizers. In 2020, we partnered with Transformative Leadership for Change (TLC) and launched the Another World is Possible Fund. Through this initiative,



Chinook Fund envisions a Colorado where social justice movements are abundantly resourced and liberated communities are thriving.

we have raised and redistributed over \$1 million in under three years to meet urgent needs rapidly. As we continue to educate donors and reform philanthropic practices, Chinook Fund remains an essential supporter of underserved movements and regions.

Reflecting on our journey, Chinook Fund has been a cornerstone in funding emerging efforts, often championing causes deemed 'risky' by mainstream foundations. Whether it was supporting LGBTQ+ organizations during contentious times or backing initiatives for undocumented immigrants, we have consistently shown courage and foresight. In 2002, we embarked on a transformative journey to deeply examine and confront the impacts of racism and

intersecting oppressions. Today, Chinook Fund stands as a beacon of progressive support actively inviting donors, volunteers, and grant applicants to join us in continuing to foster meaningful change.

After releasing a strategic plan in 2018, Chinook Fund continued our commitment to evolving and refining our strategies. In 2023, we held a strategic planning retreat, and in 2024, we partnered with Project Mosaic to review and revise our existing plans further. As part of a multi-phased process, we conducted a one-day strategic planning retreat for our board and staff in Denver, Colorado, on April 4, 2024. This event is a key step in our ongoing journey to enhance our effectiveness and impact.

Meet the Chinook Staff

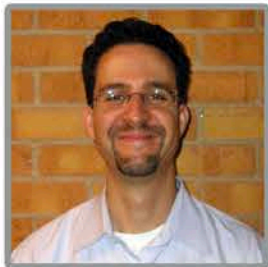


Crystal Middlestadt | Executive Director

Crystal (They/Them) joined Chinook Fund in April 2018 and brings a depth of experience with nonprofit leadership, resource mobilization, and social justice. Crystal previously worked for the Grassroots Institute for Fundraising Training (GIFT) and Survivors Organizing for Liberation, a former Chinook Fund grantee.

Mateo Parsons | Program Director

Mateo (He/Him) joined Chinook Fund in May 2024. Inspired by his maternal grandmothers' family's participation in the farmworker labor movement, Mateo has dedicated himself to a life in service to his community. He previously worked for Four Winds American Indian Council, Bell Policy Center, and Colorado Consumer Health Initiative.

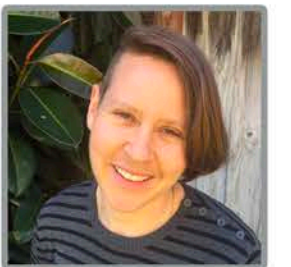


P. Barclay Jones | Program Manager

Barclay (He/Him) joined the team in 2019. He works with our Giving Project donor organizers, facilitating groups of dynamic individuals as they engage in political education and democratically distribute funding to community organizations across Colorado. Additionally, Barclay serves as a consultant to nonprofit, public and private organizations seeking to improve their performance.

Mac Liman | Interim Program Coordinator

Mac (She/Her) served in a temporary staff role from December 2023 through July 2024 during a Program Director search. She has a long history with Chinook Fund, serving in various capacities since 2007, including Finance & Investment and Fundraising committees, as a Giving Project and White Privilege Caucus facilitator, and as a member of the Board of Directors from 2014-2020. Mac is an expert bicycle mechanic and has taught thousands of people to fix bikes.

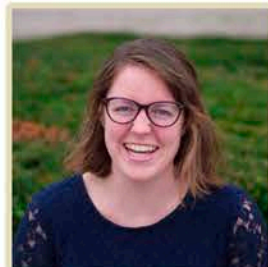


Alma Urbano | Grants Manager

Alma (She/Her) joined Chinook Fund in April 2024. She previously worked for Project VOYCE, a former Chinook Fund grantee, and the GES Coalition. As a member of the 2020 Fall Giving Project, Alma fell in love with the practice of facilitating redistribution of wealth and grassroots fundraising.

Trena Moya | Finance & Operations Manager

Trena (She/Her) joined Chinook Fund soon after completing the Spring 2021 Giving Project, where she gained a better understanding of her responsibility and role in helping to bring about systemic change. Trena worked in the banking industry for several years before beginning her 20+ year career in the nonprofit and philanthropic sector, working with both local and international organizations.



Shelby Bates | Development & Communications Manager

Shelby (She/Her) joined Chinook Fund in December 2023. Her participation in the Giving Project in Spring 2021 fundamentally changed her relationship to money. Shelby's past work experience has been with the disability community, including campaigns around Medicaid Expansion and college access for students with intellectual disabilities.

Vision Statement:

During the strategic planning session, Chinook Fund's vision statement underwent discussion, resulting in a refined version.

- **Original Vision Statement:**

“Chinook Fund envisions a Colorado where social justice movements are abundantly resourced, and communities thrive.”

- **Proposed New Vision Statement:**

“Chinook Fund envisions a Colorado where social justice movements are abundantly resourced and liberated communities are thriving.”

We collectively incorporated the word "liberated" into our vision statement, underlining our commitment to a more holistic and inclusive approach to social justice. This addition highlights our dedication to collective liberation, acknowledging that true societal transformation requires freeing all communities from oppression and systemic injustices.

This adjustment reflects our unwavering belief in the interconnectedness of social justice movements and the importance of creating spaces where all communities can thrive. It inspires us to strive toward a more just and equitable Colorado for everyone.

Mission Statement:

“Chinook Fund seeds community-led, systemic change by mobilizing resources for and trusting in grassroots social justice organizations across Colorado.”

At our strategic planning session, Chinook Fund reaffirmed our commitment to our existing mission statement. The concept of "seeding change" generated meaningful dialogue, culminating in the consensus that "seeds" accurately describe the grant-making we undertake. This metaphor aptly acknowledges our role in nurturing and helping organizations to germinate and grow.



Values

Chinook Fund reaffirmed our commitment to the values of Liberation and Leadership, however, changes have been made to the description of Leadership and Integrity. For more information about the changes, see page 12.

Liberation.

In our words and actions, we honor the inherent dignity, strength, and wisdom of the individual and the collective. We actively challenge practices that dehumanize and isolate people, and cultivate practices that bring people together across our differences to achieve community-led, systemic change, justice, and peace. We believe everyone has a role to play in collective liberation.

Community.

We build caring, respectful relationships with one another. Recognizing our interdependence, we are committed to action that moves us all closer to our vision of liberation, connection and abundance. We honor our relationship with the natural world, which sustains us all.

Leadership.

We encourage learning, experimentation, and innovative thinking, as well as support the development of grassroots leaders. We embrace our role as leaders in the movement for social justice philanthropy and are willing to take strategic risks in service of our vision of abundantly resourced movements. We intentionally center BIPOC leadership and prioritize funding BIPOC-led groups.

Integrity.

We are honest, accessible, and transparent in our work and advocate for the same in our partner organizations and the field of philanthropy. We understand the power and responsibility that comes with mobilizing financial resources and are accountable to our community.

Summary of Key Points in 2024 Action Plan Discussion (1)

The following four priorities were identified at the strategic planning session:

Renaming/rebranding Chinook Fund:

We acknowledge and affirm the cultural, political, and historical significance of the term "Chinook" in the Pacific Northwest. In this strategic plan, we commit to renaming our organization and initiating reparations to the Chinook Peoples.

- Create realistic timeline
- Balance urgency with capacity
- Prioritize a budget for rebranding
- Invite the board to play an active role in the process
- Gather community feedback in the process



"In our most recent strategic planning session, Chinook Fund comprehensively reviewed our core organizational pillars. This included thoroughly reassessing our values, vision, mission, and action plans. This process ensures that our strategic direction remains aligned with our commitment to social justice and effectively responds to the evolving needs of the communities we serve."

Summary of Key Points in 2024 Action Plan Discussion (2)

Defining Black Liberation and Indigenous Sovereignty:

We will develop and refine the organization's understanding of Black Liberation and Indigenous Sovereignty as it relates to grantmaking, political education, and organizational leadership by considering diverse perspectives.

- Acknowledge these are evolving concepts
- Deepen internal political education on these concepts
- Consider diverse perspectives
- Prioritize these definitions in next retreat
- Update relevant frameworks to training modules
- Clarify definitions in GP curricula and priority funding areas

Summary of Key Points in 2024 Action Plan Discussion (3)

Aligning internal culture:

We will strive to create a supportive and cohesive work environment where staff feel valued and engaged.

- Ensure staff feel supported and resourced
- Conduct staff satisfaction surveys
- Track hiring and retention metrics
- Invest more in staff retreats
- Center team-building, goal-setting and culture-building

Summary of Key Points in 2024 Action Plan Discussion (4)

Clarifying and shifting funding criteria

The funding criteria will be refined to better align with the organization's mission and vision. We do not anticipate significant changes to core criteria or priority areas. The focus will be on refining definitions and clarifying criteria for grantmaking and Giving Projects.

- Convene Program Committee to gather feedback from grantees, GP alum, community members
- Update criteria and definitions
- Ensure all staff are well trained on implementing updated funding criteria throughout grantmaking processes
- Recommit to practice of providing feedback to grant applicants whose requests are denied

Reaffirmation of Values

Chinook Fund has reaffirmed our commitment to the organizational values established in 2019 outlined below. During our strategic planning session, we considered minor refinements thoughtfully, ensuring our values evolve in step with new insights and feedback from our community. This process reflects our dedication to staying dynamic and responsive to the needs and aspirations of the community partners we serve.

Proposed New Description of Integrity

We are honest, accessible, and transparent in our work and advocate for the same in our partner organizations and the field of philanthropy. We understand the power and responsibility that comes with mobilizing financial resources and are accountable to our community.

Dialogue on Integrity in Philanthropy

During our strategic planning session, the value of integrity sparked the most conversation, particularly within the context of philanthropy. Integrity was examined primarily in terms of transparency—emphasizing trust in our grantees and ensuring our own trustworthiness. The discussion distinguished between basic trust and trust-based philanthropy, with the latter being characterized by the swift movement of funds instead of more traditional, rigorous methods. A key suggestion was shifting from the term "steward" to "mobilizer" to reflect active engagement and empowerment better. Additionally, there was a strong preference to use "community" over "constituents" to emphasize our commitment to serving those we support.



Justice for the People Legal Center Grantee

Proposed New Description of Leadership

We encourage learning, experimentation, and innovative thinking, as well as support the development of grassroots leaders. We embrace our role as leaders in the movement for social justice philanthropy and are willing to take strategic risks in service of our vision of abundantly resourced movements. We intentionally center BIPOC leadership and prioritize funding BIPOC-led groups.

Dialogue on Leadership

During our strategic planning discussions, we centered the conversation on redefining leadership. We emphasized that leadership within Chinook Fund is not about adhering to traditional patriarchal structures but about embracing a responsibility rooted in service and continual learning. We highlighted the critical importance of intentionally centering Black, Indigenous, and People of Color (BIPOC) in leadership roles. This commitment extends to prioritizing funding for BIPOC-led groups and ensuring BIPOC representation across all levels of our organization, including grantmaking, board membership, and staff roles.

Chinook Fund Decision Making Map

The decision-making tree below visually represents the key considerations that Chinook Fund addresses before making pivotal organizational decisions. It prompts us to examine how well potential actions align with our organization’s vision, assess our motivation and capacity, and consider the anticipated impact of these actions. This tool serves as an essential guide, ensuring that our decision-making processes are informed, thoughtful, and aligned with our strategic objectives.



**High
Importance**

Alignment with Vision

Does this align with our mission, vision, and values?
Does this align with our goals?

Impact

How does this impact social justice movements?
Does this have an inequitable impact, especially race and class?

Motivation and Capacity

Are we excited about this?
Do we have the energy and capacity to do this?



Mountain Pride



Previous Strategic Plan Progress Summary

In our 2018 strategic plan, Chinook Fund prioritized clarifying our organizational purpose and vision, deepening our impact across the state, refining our funding criteria, enhancing engagement opportunities for Giving Project alumni, and maximizing the social impact of our endowment assets. Below, we are pleased to share a summary of our accomplishments and our significant progress from 2018 until the present.

- **Clarify Organizational Purpose and Vision**
- **Deepen Statewide Impact**
- **Refine Funding Criteria and Definitions**
- **Giving Project Alumni Engagement**
- **Summary of 2023 Assessment Process**

Previous Strategic Plan Progress Summary (1)

Clarify Organizational Purpose and Vision:

Chinook Fund has successfully adopted a new mission statement, a theory of change, and refined our core values to reflect our evolving objectives and community commitments better.

Deepen Statewide Impact:

To enhance our presence and effectiveness in rural areas:

- In 2019, we established a Rural Advisory Committee to offer insights on funding criteria and address the unique needs of rural communities throughout Colorado.
- In 2022, we strengthened our governance by recruiting a rural grantee leader to our Board of Directors.
- We have significantly increased our outreach and funding to rural groups, demonstrating our commitment to statewide impact and support.

Refine Funding Criteria and Definitions:

Chinook Fund has made significant advancements in refining our funding criteria to better align with our commitment to diverse community needs:

- We expanded the category of "Community Organizing" to include "Healing Justice" and "Cultural Organizing" as essential subsets, enhancing our support for these critical areas.
- Recognizing the importance of targeted support, we added "Black Liberation" and "Indigenous Sovereignty" to our priority funding areas. This strategic inclusion has notably increased our outreach and funding to Black-led and Indigenous-led groups.
- At our 2019 Cultivating Community event, we actively engaged community members to refine our understanding and definitions of community organizing, healing justice, and cultural organizing.
- We have affirmed our commitment to racial justice in our grantmaking practices, with 87-92 percent of our annual grantees being BIPOC-led consistently since 2020.



Colorado Jobs with Justice, grantee

Previous Strategic Plan Progress Summary (2)

Giving Project Alumni Engagement:

Chinook Fund has deepened our engagement with Giving Project alumni, leveraging their expertise and commitment across various levels of our organization:

- We have fostered leadership development through substantial alumni involvement: 86% of our Board members, 50% of our staff, and 100% of our Resource Mobilizer Committee are proud Giving Project alumni. Additionally, we host specific events such as Black alumni gatherings and various volunteer-driven activities.

Increase social impact of endowment assets:

- In 2019, we partnered with Transformative Leadership for Change and the Center for Community Wealth Building to host the nationally renowned Transform Finance Institute. This event provided critical education and frameworks on social justice, finance, and impact investing.
- From 2023 to 2024, we convened a community-led working group to revise our Investment Policy Statement, ensuring it better aligns with Chinook Fund's mission and values.



Giving Project alumni ice cream social, June 2023

Summary of 2023 Assessment Progress:

As part of our ongoing assessment and community engagement efforts, Chinook Fund engaged key community partners—including grantees, donors, Giving Project (GP) alumni, Board members, and staff—in a comprehensive feedback process. Community partners shared their insights through online surveys and participated in virtual focus groups. Feedback was solicited in a number of areas, including organizational strengths, areas for growth, grant criteria, community relationships, and a possible name change. Notably, all focus group participants, including GP alumni and grantees, identified as BIPOC, reflecting our commitment to inclusivity.



One participant highlighted, “Chinook Fund practices its value of Liberation by prioritizing Black- and Indigenous-led organizations in our grantmaking, following the lead of community members/groups to support their work, and making space for many people to be part of the work through the Giving Project.”

Conclusion

Chinook Fund remains at the forefront of resourcing grassroots movements in Colorado, driven by our steadfast commitment to collective action and community solidarity. We are dedicated to nurturing inclusive communities and resilient environments where diverse perspectives thrive.

As Chinook Fund progresses, our resolve to advance our mission through strategic planning and collaborative efforts is unwavering. We eagerly anticipate embarking on a new phase filled with impactful initiatives guided by our enduring commitment to social justice and equitable community development.

"Chinook Fund would like to thank Project Mosaic, LLC for their help with the facilitation of the strategic planning process and the creation of this report."



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CREATING CONNECTIONS