**VISION**
The Geraldine R. Dodge Foundation envisions an equitable New Jersey through creative, engaged, sustainable communities.

**MISSION**
The Geraldine R. Dodge Foundation supports arts, education, environment, informed communities, and poetry to connect communities and influence social change to achieve an equitable New Jersey.

**APPROACH**
We deploy our resources to produce tangible and measurable progress toward our vision through:

- Grantmaking
- Capacity building and technical assistance
- Special programming and initiatives
- Social-impact investing
- Convenings
- Storytelling
- Stakeholder engagement

We steward and leverage all our resources, financial and human, to advance our vision, including our:

- Reputation and legacy
- Expertise and talent
- Power and voice
- Endowment and financial resources
- Relationships and networks

We partner with and support the nonprofit sector to be valued and effective influencers for community-level change in New Jersey, with a priority focus on elevating the voices and power of those communities that have been historically and systematically excluded from investment and opportunity.

**VALUES**
The values that guide the Foundation are:

- **COLLABORATION:** Internal and external collaboration leads to the best ideas and solutions.
- **EQUITY:** Diversity, equity, and inclusion are essential to resilient organizations and communities.
- **LEARNING:** Curiosity, listening, and risk-taking are key to creativity and innovation.
- **RESPECT:** Empathy, respect, humility, accessibility, and transparency are the foundation of successful relationships.
- **STEWARDSHIP:** Effective stewardship of our resources ensures a long-term commitment to New Jersey.

**EQUITY**
At the Geraldine R. Dodge Foundation, equity means aligning our resources to address historical, institutional, and structural impediments so that New Jerseyans of all races and communities have what is needed to realize a quality life.
FOR MORE THAN 40 YEARS, the Geraldine R. Dodge Foundation has nurtured leaders, ideas, and institutions that use creative problem-solving to promote a sustainable future. The Foundation’s focus is New Jersey, carrying out its work in program areas that have evolved over time in response to social, economic, and cultural changes. Its program areas today are arts, education, environment, informed communities, and poetry, in addition to a technical assistance initiative aimed at building grantee capacity. To date, the Foundation has made nearly $500 million in grants and currently has more than $300 million in assets.

Inspired by a desire to support New Jersey communities well into the future, Dodge’s board of trustees acted in 2015 to preserve the Foundation’s resources in perpetuity. Facing a grantmaking budget and expenses that were outpacing its endowment returns, the Foundation reduced its grantmaking in 2016 and began reviewing its legacy and lessons learned, and exploring intersections of its program areas.

Dodge launched a formal strategic planning process in the summer of 2017 with an internal assessment of the Foundation’s culture, history, and practices, as well as an external look at key indicators of quality of life in New Jersey. As part of those efforts, the Foundation commissioned the Center for Effective Philanthropy (CEP) to conduct an in-depth grantee perception survey. Another part of the work was to gauge the intercultural development of Dodge’s board and staff. For this, the Foundation utilized the Intercultural Development Inventory (IDI), an internationally recognized cultural competency assessment.

Looking out at the wider landscape, the Foundation collected data on key quality-of-life indicators for the state that illustrated New Jersey is not only one of the most diverse and densely populated states in the country, but also one of the most segregated and with one of the widest gaps in income between its richest and poorest residents. With a high degree of consistency, the data showed that race determines many life outcomes, including wealth, health, housing, educational attainment, environment, and employment.

The results of this internal and external assessment led the Foundation to more closely consider the challenges of racial and income inequities and disparities in New Jersey and the impacts on its residents. The Foundation committed to address these as the central focus of its strategic plan.

Equity is one of the most important issues facing society today, and foundations and nonprofits across the country are working to address inequities in the communities they serve. By centering equity in its plan, Dodge seeks to learn what’s working elsewhere, and to bring its deep knowledge of New Jersey and programming perspective to address equity issues in the state.

Through this process, Dodge trustees and staff developed a revised vision, mission, and values statement, a definition of equity, and goals and strategies to guide the Foundation’s strategic direction.
PROGRAM: The majority of resources (grants, technical assistance, convenings) in all our program areas will benefit under-resourced and under-represented communities.

- **Laying the Groundwork (2018):** Continue grantmaking and initiatives under current guidelines and processes while designing a framework to advance equity across all programs.
- **Moving Toward Our New Vision (2019):** Share and solicit feedback on equity framework, pilot new equity strategies and cross-program collaborations, develop revised grantmaking guidelines and processes, and launch expanded technical assistance program to include diversity, equity, and inclusion.
- **Living Our Vision (2020):** Apply revised guidelines and processes to grantmaking, programs, and initiatives, reducing barriers to funding and resources.

EXTERNAL IMPACT: Communities across New Jersey recognize and value their interdependence, and those disproportionately impacted by structural inequities have greater voice, power, and influence.

- **Laying the Groundwork (2018):** Research and map communities, organizations, and leaders that have been disproportionately impacted by systemic and structural inequities in New Jersey in our program areas.
- **Moving Toward Our Vision (2019):** Pilot convenings to connect people and build networks, continue to learn about structural inequities, develop with partners a shared commitment to solutions, and strategically use communications platforms to engage in conversations about equity.
- **Living Our Vision (2020):** In collaboration with partners, design and carry out outreach and policy agenda.
**FINANCE:** We are responsible stewards of our financial assets, growing them to ensure future impact, and aligning our investments and expenditures with our vision, mission, and values over the long term.

- **Laying the Groundwork (2018):** Continue to steward endowment for growth, and research best practices in mission-aligned investing and organizational budgeting.
- **Moving Toward the Vision (2019):** Maintain endowment growth strategy, advance board and staff learning around mission-aligned investments, and review current investment policy, asset management, and grantmaking portfolio through newly developed equity framework.
- **Living the Vision (2020):** Maintain robust investment returns, while developing an action plan to ensure mission-alignment with investment policies and practices.

**INTERNAL IMPACT:** We will align our organizational culture, governance, operations, policies, and practices with our vision, mission, and values.

- **Laying the Groundwork (2018):** Proactively learn as an organization about diversity, equity, and inclusion strategies, models, and outcomes to advance the Foundation’s intercultural growth while developing and sharing knowledge with key partners.
- **Moving Toward Our Vision (2019):** Begin to integrate the newly developed equity framework throughout our governance, operations, policies, and practices.
- **Living Our Vision (2020):** Continue to integrate Foundation governance, operations, policies, and practices within the equity framework.