



Meeting the Moment

Proteus Fund 2021-2023 Strategic Plan

Dear Proteus Fund Partners and Allies,

I'm writing to share exciting news: After 18 months of thoughtful analysis and deep external and internal conversations, Proteus Fund has finalized its 2021-2023 strategic plan. Proteus Action League ("PAL"), Proteus Fund's affiliated 501(c)(4) organization, simultaneously engaged in a similar process to discuss that entity's strategic objectives and how PAL can work side by side with Proteus to complement and advance the social justice mission of Proteus Fund.

Board members and staff of both organizations were doubly motivated to complete these efforts against the backdrop of never-ending racist killings of Black women, men, and children; the resulting mass mobilizations; the COVID pandemic; and an actual insurrection. We have done the strategic planning work that Proteus Fund donors, grantees, Fiscally Sponsored Projects (FSPs), and other stakeholders deserve. And we have concluded this process renewed, re-committed, and inspired.

Proteus Fund's new strategic plan centers our future efforts on racial, gender, queer, and disability justice and an inclusive, representative democracy. One way to look at the new vision is to think of this approach as a stool with many legs—our theory of change assumes that these goals are intrinsically intersectional and mutually reinforcing. Fully advancing racial, gender, queer, and disability justice is impossible without a robust democracy which, by its very nature, must be fully inclusive and representative of all the people.

Emerging from our last strategic plan, one of Proteus Fund's current strengths is our significant reach across movements. The new strategic plan builds on this and, in fact, incorporates this approach as a permanent feature of the Proteus Fund model of social justice philanthropic practice. Our three current donor collaboratives—[Piper Fund](#); [Rights, Faith, and Democracy Collaborative](#); and [RISE Together Fund](#)—are working more synergistically than ever before, with significant success reflected in our donor mobilization, grantmaking, and non-grantmaking movement support. Seen collectively, these donor collaboratives are a living laboratory illustrating how racial, gender, queer, and disability justice can intersect with each other and with democracy transformation in America.

Likewise, fiscal sponsorship of progressive initiatives remains an essential element of our model. Proteus Fund is home to a [rich portfolio](#) of projects aligned to our vision, mission, and values, addressing, among other issues:

- building progressive narrative power and movement messaging;
- advancing electoral reforms and government accountability;
- supporting the leadership of women, queer, and trans youth of color;
- defending reproductive rights and preventing violence against women;
- creating tools and community that help children be more thoughtful and informed about race;
- mobilizing resources for a progressive Jewish movement for justice and liberation; and shifting philanthropic practice with a focus on equity and impact.

By incubating and/or sustaining the growth and impact of such critical social justice initiatives over time, we deepen our work at the intersections of democracy and racial, gender, queer, and disability justice while simultaneously helping to build more powerful movements.

Our partners have made significant use of PAL, a 501(c)(4) affiliate of Proteus Fund, especially in the tumultuous last few years. As part of its role moving forward, PAL plans to work with donors and other partners to explore options that significantly scale these efforts to provide important and complementary support to Proteus Fund's social justice mission. In the fight for democracy and racial, gender, queer, and disability justice, we can leave no tool off the table—and that includes PAL's capacity to resource more expansive lobbying and ballot measure work.

We view operations as a core element to providing a high-quality platform upon which all of our social justice initiatives can evolve and thrive. These efforts won't be successful unless our partners trust that our organization has strong operational structures and services animated by an overall alignment around vision, mission, and values. Under our new plan, Proteus Fund will continue our efforts to center and enhance excellence in all aspects of organizational operations.

Taken as a whole, the Proteus Fund's newly adopted strategic plan calls us to be greater than the sum of our individual parts. We are inspired by the call to action embedded in our new strategic direction, and hope you are as well.

Sincerely,

A handwritten signature in black ink, appearing to read "Paul Di Donato". The signature is fluid and cursive, with the first name "Paul" being the most prominent.

Paul Di Donato, President & CEO

Proteus Fund's New Strategic Frame



Proteus Fund, along with its affiliated 501(c)(4) organization Proteus Action League (PAL), partners with donors, grantees, and other social justice allies to advance racial, gender, queer, and disability justice and an inclusive, representative democracy.

Proteus Fund's work and operations are powered by our mission, vision, and values. They guide our efforts to catalyze progressive change in close partnership with donors and movement actors. These core tenets mutually reinforce and support each other. Taken together they define how, why, and where we aim to lead, partner, and support.

Mission: Proteus Fund partners with donors, grantees, and other advocates to advance democracy, human rights, and peace.

Vision: A just, equitable, and democratic world.

Values: Proteus Fund operates and pursues its work based on a set of values synergistic with our vision and mission:

- Diversity, equity, and inclusion;
- Integrity and professionalism;
- Transparency and accountability; and
- Respect and humility.

PAL, a 501(c)(4) affiliate of Proteus Fund, works towards the same mission and vision with the same values, employing strategies available to a 501(c)(4) organization, to support and enhance the work of both entities.

Field Impact Priorities

We commit to fostering conditions for an equitable, inclusive, and just society by advancing two intersectional field-facing goals:

Goal 1:

Across Proteus Fund’s work, center justice for marginalized communities in the United States, including Indigenous, Black, Latinx/a/o, Asian and Pacific Islander, Arab and Middle Eastern, and LGBTQ communities as well as women, people with disabilities, religious minorities, and immigrants (hereinafter in Plan identified as “marginalized communities”).

Goal 2:

Catalyze and support efforts to build and sustain an inclusive, fully representative, and robust democracy.

Strategies

- A. Enhance movement building.** Resource and support grassroots organizations, advocacy groups, coalitions, and alliances led by or serving marginalized communities to enhance their capacity and efficacy in building, wielding, and sharing power.
- B. Advance progressive law and policy.** Leverage, expand, and safeguard law and public policy, especially at the state and local level, that furthers racial, gender, queer, and disability justice; protects religious minorities and immigrants; and builds an inclusive, representative, and robust democracy.
- C. Increase resources.** Catalyze, diversify, expand, align, and leverage financial support and other forms of support funders can provide for organizations that advance our goals and strategic priorities.
- D. Nurture a progressive ecosystem.** Foster opportunities for donors and social-justice actors to learn and evolve their thinking on critical issues and movements. Catalyze the possibility of collaborative action through convenings and other critical dialogues among Proteus Fund donors, FSPs, grantee partners, and other stakeholders.
- E. Promote narrative change.** Continue to educate and organize donors and build field capacity to strengthen progressive narrative and messaging development. Further Proteus Fund as a philanthropic thought and practice leader in progressive narrative development and messaging efforts.
- F. Improve philanthropic practice.** Maintain and enhance Proteus Fund’s role in advancing the practice of philanthropy. Educate and organize donors around the insights and lessons learned from our field-facing, grantee- and movement-centered philanthropy.

Organizational Change Priorities

To advance the Field Impact goals and strategic priorities noted above, Proteus Fund will pursue an additional four organizational goals and supporting strategic priorities:

Goal 3:

Enhance Proteus Fund's thought leadership for the philanthropic sector.

Goal 4:

Strengthen high-quality, baseline strategic and operational practices across all streams of programmatic work.

Goal 5:

Maintain and strengthen Proteus Fund's diverse, inclusive, skilled, and values-aligned Board of Directors.

Goal 6:

Define and ensure operational excellence in the context of a social justice philanthropic intermediary.