



McMILLAN
FAMILY FOUNDATION

Strategic Plan

(FORMATION YEARS)
2025 - 2027

OVERVIEW

- 1.Introduction
- 2.Vision & Mission
- 3.Year 1 – Foundation & Awareness
- 4.Year 2 – Growth & Program Expansion
- 5.Year 3 – Sustainability & Regional Recognition
- 6.Key Performance Indicators (KPIs)
- 7.Expected Outcomes by Year 3
- 8.Conclusion



INTRODUCTION

- Founded to empower underserved communities through education, entrepreneurship, financial literacy, and wellness
 - Committed to sustainable, scalable impact with clear goals and measurable outcomes
 - Roadmap for building infrastructure, expanding programs, and developing funding
 - Invitation to partners and community to join mission
- 

VISION & MISSION



Vision

Empower individuals and communities through education, entrepreneurship, financial literacy, health, and wellness

Mission

Provide programs, scholarships, grants, and resources that inspire self-sufficiency and equitable opportunities

YEAR 1 – FOUNDATION & AWARENESS

Primary Goal: Establish organizational infrastructure and brand identity; launch initial programs

Key Objectives:

- Governance policies & Board of Directors
- Grant and donor management systems
- Brand identity, website, social media
- Launch Laptop Scholarship and Empowerment Microgrant programs
- Pilot workshops: Financial Literacy & Entrepreneurship
- Community partnerships and events
- Track participation and outcomes

YEAR 2 - GROWTH & PROGRAM EXPANSION

**Primary Goal: Scale impact, deepen relationships,
build sustainable funding**

Key Objectives:

- Expand Laptop Scholarship and Microgrant programs (including mentorship)
- Launch Health & Wellness Initiative
- Hire staff and train volunteers
- Partner with nonprofits and local businesses
- Introduce donor circles and annual gala
- Develop impact dashboard and collect success stories

YEAR 3 - SUSTAINABILITY & REGIONAL RECOGNITION

Primary Goal: Become a leading community resource with sustainable growth

Key Objectives:

- Solidify ongoing programs
- Introduce Educational Advancement Grants and Entrepreneurship Incubator
- Gain media coverage and publish Annual Impact Report
- Build endowment and expand sponsorships
- Multi-year funding commitments
- Leadership development and professional training
- Strategic review for next phase

Key Performance Indicators (KPIs)

Why Key Performance Indicators (KPIs) Matter

- **Measure Progress:** KPIs provide concrete data to track how well we are achieving our goals over time.
- **Ensure Accountability:** They help keep the organization and its team members responsible for delivering results.
- **Inform Decision-Making:** By understanding what's working and what's not, KPIs guide strategic adjustments and resource allocation.
- **Demonstrate Impact:** Clear metrics help communicate our effectiveness to donors, partners, and the community.
- **Motivate & Align:** KPIs keep everyone focused and motivated toward common objectives, ensuring alignment across programs and initiatives.
- **Support Continuous Improvement:** Regular monitoring of KPIs drives ongoing learning and refinement to maximize positive outcomes.

Number of individuals served annually

Total grant and scholarship funds distributed

Number of partnerships with nonprofits & businesses

Growth in donor base and recurring gifts

Participant satisfaction and impact

EXPECTED OUTCOMES BY YEAR 3



Hundreds of
students
equipped for
academic
success



Dozens of
entrepreneurs
launched or
expanded



Increased
financial
literacy and
access to
wellness
resources



Financially
stable
foundation
with strong
donor support



Legacy of
empowerment
and
opportunity
for future
generations

CONCLUSION

- Commitment to lasting, meaningful change through transparency and accountability
- Call to action for board, donors, partners, and community
- Focus on collective impact through education, entrepreneurship, financial wellness, and health
- Continuous evaluation and learning to ensure effectiveness
- Vision to be a trusted catalyst for empowerment and equity for generations



McMILLAN
FAMILY FOUNDATION

Questions?