



**FOUNDATION
FOR THE MID SOUTH**

STRATEGIC PLAN 2025-2030

Prepared by:



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Executive Summary

The **Foundation for the Mid South's (FMS)** five-year (March 1, 2025 – February 2030) Strategic Plan outlines a comprehensive approach for the foundation to enhance its work to promote racial, social and economic equity in Mississippi, Louisiana and Arkansas. This plan focuses on three key strategic priorities: Education, Health and Wellness and Economic Development.

The strategic plan intentionally divides Economic Development into two distinct but complementary categories—**Community Development** and **Wealth Building**—to address the multifaceted challenges of equity and prosperity in Mississippi, Louisiana and Arkansas. **Community Development** focuses on systemic, collective improvements to the region's economic and social infrastructure, aiming to create environments where all residents can thrive. This category includes efforts to prioritize long-term, community-wide progress, often requiring collaboration with local governments and institutions. By contrast, **Wealth Building** targets individual and household financial well-being, aiming to empower marginalized populations through initiatives that focus on immediate, tangible outcomes for individuals. The distinction between the two categories reflects a strategic recognition that systemic economic equity requires both community-level investments to dismantle structural barriers and direct interventions to address intergenerational wealth gaps. By separating these priorities, the Foundation ensures targeted resource allocation, with Community Development addressing macro-level infrastructure and Wealth Building fostering micro-level financial resilience—a dual approach designed to amplify collective progress while uplifting individuals and families across the Mid South.



Executive Summary | Cont.

During FMS' SWOT analysis process, key stakeholders—including community leaders, nonprofit partners, board members, and other allies—emphasized the urgent need for FMS to adopt a more targeted and proactive approach to addressing interconnected health and economic disparities. Participants highlighted persistent challenges such as disproportionately high rates of preventable chronic diseases, limited access to mental health resources, and systemic barriers to wealth accumulation in rural and marginalized communities. These stakeholders advocated for FMS to prioritize measurable, high-impact interventions that directly confront root causes of inequity, rather than incremental or reactive solutions. This critical feedback catalyzed the strategic shift toward bold, outcome-driven goals—such as reducing regional obesity rates by 8%, increasing affordable housing availability by 20%, and expanding minority-owned businesses by 15%. By aligning these objectives with stakeholder-identified priorities, FMS aims to:

- 1.** Accelerate progress through data-informed, community-coordinated initiatives
- 2.** Address systemic gaps in healthcare access and economic mobility
- 3.** Leverage cross-sector partnerships to amplify scalable solutions

The resulting strategies reflect a deliberate escalation in ambition, ensuring FMS' work not only mitigates immediate challenges but also dismantles structural inequities to foster generational resilience across the Mid South region.



Executive Summary | Cont.

Key Goals:

- Improve high school graduation rates by 10%
- Increase college readiness for underserved students by 15%
- Reduce obesity rates by 8%
- Increase access to mental health services by 25%
- Increase affordable housing availability by 20%
- Reduce unemployment rates by 5%
- Increase families with emergency savings by 30%
- Expand social entrepreneurship and nonprofit community-based businesses by 15%

These goals represent a combination of continued efforts and new, more ambitious objectives. They were identified through a rigorous process led by Unboxed Philanthropy – involving extensive analysis of FMS’ grantmaking programs and operation data; stakeholder consultations; and alignment with regional and national benchmarks. The percentage targets were set based on current trends, potential for impact, and consideration of internal and external factors such as economic conditions and policy environments. Although this is in consideration of a span of five years, it is suggested that a review be done between two and three years to assess if the goals should be adjusted.

The five-year action plan includes:

- 1.** Needs assessment and baseline establishment
- 2.** Program refinement and expansion
- 3.** Mid-term evaluation and scaling of high-impact programs
- 4.** Cross-sector initiatives and public-private partnerships
- 5.** Comprehensive evaluation and sustainability planning



Methodology

The methodology for developing the strategic plan is rooted in a five-step, regionally tailored process designed to address systemic disparities in education, health, and economic mobility across Mississippi, Louisiana and Arkansas. This approach combines stakeholder engagement, data-driven benchmarking, and adaptive resource allocation to ensure alignment with community needs and accountability to measurable outcomes.

1. Stakeholder Engagement and Baseline Development

Baseline metrics were established through collaborative stakeholder engagement and historical data analysis. For **Mississippi**, the process included the review of a SWOT analysis with more than 35 community leaders and school districts, informed by the Mississippi Economic Council's [Blueprint Health Care Report](#) (Mississippi Economic Council, 2023). Historical graduation rates, obesity trends (39.5%), and unemployment figures were drawn from state agencies like the Mississippi Department of Health's Behavioral Risk Factor Surveillance System (BRFSS) ([State Health Improvement Plan](#)). **Louisiana** aligned its education targets with the Louisiana Board of Regents' [Master Plan](#), prioritizing NAEP-adjusted literacy goals, while health benchmarks incorporated SAMHSA-funded parish surveys to address stroke mortality rates 29.6% above the national average ([Healthy State Workforce Report](#)). In **Arkansas** the Arkansas Economic Development Commission's workforce data was leveraged to identify AP enrollment gaps and chronic disease prevalence (37.4% adult obesity), using the ARCHES survey for validation ([ARCHES Health Survey](#)).

2. Regional Benchmarking Against National Standards

The Mid South's metrics were compared to national benchmarks to prioritize high-impact interventions. **Mississippi** ranks 48th in overall health and 47th in infant mortality, with systemic gaps in affordable housing and minority business ownership ([Southeast Crescent Regional Commission Report](#)). **Louisiana**, ranked 48th in America's Health Rankings, focused on reducing maternal mortality and improving mental health access through parish-level initiatives. **Arkansas**, 42nd in workforce development ROI, targeted obesity-related ER visits (15% reduction goal) and credential attainment gaps using IMPLAN economic modeling ([Arkansas Economic Recovery Strategy](#)).



Methodology | Cont.

3. Data-Driven Target Setting

SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) criteria guided the development of state-specific KPIs:

- **Education:** Mississippi aims for an 8% reduction in proficiency gaps via MAAP assessment cycles, while Louisiana targets a top 10 NAEP ranking by 2025 through literacy programs. Arkansas's "Ascent to 55%" initiative ties credential attainment to labor market demands
- **Health:** Mississippi prioritizes a 10% reduction in adult smoking by 2030, Louisiana a 20% decline in stroke mortality, and Arkansas a 15% drop in obesity-related ER visits
- **Economic Development:** Mississippi allocated 45% of its budget to workforce training, Louisiana committed to \$20B/year in capital investments, and Arkansas aims to create 22,000 jobs through manufacturing incentives (*Master Plan for Higher Education; State Health Improvement Plan*)

4. Transparency and Validation

Baseline metrics and progress are published in the [Strategic Plan Summary Chart](#) (2025–2030), with quarterly reviews and annual evaluations to refine targets. Mississippi validates outcomes through its Department of Education Accountability System and BRFSS health reports. Louisiana tracks \$90B in capital projects via a public portal, while Arkansas uses USDA-NRCS data for quarterly economic reallocations ([Louisiana Division of Administration Capital Outlay Tracker](#); [USDA-NRCS Funding Protocols](#)).

5. Adaptive Resource Allocation

Resources are allocated to maximize impact:

- **Education:** 30% of Mississippi's budget supports early literacy, while Arkansas directs funds to high-poverty schools like Springdale
- **Health:** Louisiana invested \$31M to reduce infant mortality (ranked 47th nationally), and Mississippi expanded Medicaid with a projected 5:1 ROI
- **Economic Development:** Arkansas prioritizes rural infrastructure microgrants, while Mississippi's \$700M ITEP reforms incentivize local business growth

This methodology ensures the FMS strategic plan remains responsive to regional challenges, grounded in peer-reviewed data, and adaptable to evolving community needs.

For detailed references, see the [Key References Appendix](#).

Budget Rationale

FMS' budget allocation reflects a deliberate, evidence-based strategy to maximize impact across its three priority areas. **Education** receives 30%, grounded in its role as a catalyst for breaking intergenerational poverty and driving long-term economic mobility. **Health and Wellness** (25%) prioritizes closing urgent gaps in rural healthcare access, particularly in states like Mississippi and Arkansas, which face some of the nation's highest rates of preventable chronic diseases. **Economic Development** (45%)—the largest allocation—targets scalable solutions to systemic infrastructure challenges, such as affordable housing shortages and unemployment, while addressing persistent racial wealth gaps through entrepreneurship programs and financial literacy initiatives. This totals 100%, with flexibility ensured by reserving 5% of the total budget (drawn proportionally from each category) for emerging opportunities or crises.

Allocations were determined through:

- **Historical Impact Analysis:** Education programs (30%) reflect their proven ROI in reducing poverty cycles
- **Current Needs:** Health and Wellness (25%) addresses urgent gaps in rural healthcare access
- **Growth Potential:** Economic Development (45%) target scalable solutions (e.g., replicable housing models, fintech savings tools)
- **Adaptability:** Reserve 5% of the budget for emerging opportunities or challenges

By aligning stakeholder insights with evidence-based strategies, FMS will catalyze transformative change across Mississippi, Louisiana and Arkansas—advancing equity in education, health, housing, and economic mobility. This plan positions FMS as a national model for addressing systemic inequities through collaboration, innovation, and accountability.



Mission, Vision & Values



MISSION STATEMENT

The Foundation for the Mid South invests in people and strategies that promote racial, social and economic equity in Mississippi, Louisiana and Arkansas.



VISION STATEMENT

By 2030, the Foundation for the Mid South will be the catalyst for transformative change in the region, fostering thriving communities where all residents have equitable access to opportunities for education, health, economic prosperity, and improved quality of life.



CORE VALUES

Equity: Commitment to fairness and justice in the distribution of resources and opportunities

Collaboration: Working together with partners to achieve greater impact

Innovation: Embracing new ideas and approaches to solve complex regional challenges

Accountability: Being responsible and transparent in our actions and decisions both internally and externally

Community-Driven Solutions: Empowering local communities to lead their own development



Strategic Priorities and Goals

G1. Education

Goal 1.1: Improve high school graduation rates across the Mid South region by 10% by 2030.

To achieve this goal, the Foundation will:

- Partner with local school districts to implement evidence-based dropout prevention programs
- Support mentoring initiatives that connect at-risk students with positive role models
- Fund after-school and summer enrichment programs to keep students engaged in learning

Goal 1.2: Increase college readiness and enrollment rates for underserved students by 15% by 2030.

Strategies include:

- Expand college preparation programs, particularly in rural and low-income areas
- Provide scholarships and financial aid guidance to remove barriers to higher education
- Collaborate with colleges and universities to create bridge programs for first-generation students

Goal 1.3: Access and expand access to quality early childhood education programs in rural and low-income areas.

The Foundation will:

- Support the development of new early childhood centers in underserved communities
- Fund professional development for early childhood educators
- Advocate for increased state funding for pre-K programs



G2. Health and Wellness

Goal 2.1: Reduce obesity rates in the Mid South region by 8% through promoting access to healthy foods and physical activity.

Initiatives will include:

- Support community gardens and farmers' markets in food deserts
- Fund school-based nutrition education and physical activity programs
- Partner with local governments to create safe spaces for outdoor recreation

Goal 2.2: Increase access to mental health services in underserved communities by 25%.

The Foundation will:

- Fund telehealth initiatives to reach rural populations
- Support training programs for mental health professionals
- Collaborate with schools to implement mental health screening and support services

Goal 2.3: Access and improve maternal and infant health outcomes in high-risk populations.

Strategies include:

- Fund doula and midwifery programs in underserved areas
- Support prenatal education and care initiatives
- Advocate for policies that expand access to quality maternal healthcare



G3. Economic Development

A | Community Development

Goal 3.1a: Increase the availability of safe, affordable housing in target communities by 20%.

The Foundation will:

- Advocate for local housing authorities and developers to create affordable housing units
- Support home repair and weatherization programs for low-income homeowners
- Fund financial education programs to prepare families for homeownership

Goal 3.2a: Strengthen workforce development programs to reduce unemployment rates by 5% across the region.

Initiatives include:

- Fund vocational training programs aligned with regional job market needs
- Support entrepreneurship education and small business incubators
- Collaborate with employers to create apprenticeship and internship opportunities

Goal 3.3a: Access and enhance community resilience through environmental sustainability initiatives.

The Foundation will:

- Support green infrastructure projects in flood-prone areas
- Fund community-based climate adaptation planning
- Promote renewable energy initiatives in rural communities



G3. Economic Development

B | Wealth Building

Goal 3.1b: Increase the number of families with emergency savings by 30% through financial education programs.

Strategies include:

- Partner with local banks to offer matched savings programs
- Support financial literacy education in schools and community centers
- Fund innovative fintech solutions to promote savings among low-income populations

Goal 3.2b: Expand access to business development resources, resulting in a 15% increase in successful social entrepreneurs and nonprofit organizations.

The Foundation will:

- Fund business incubators and accelerators focused on social entrepreneurs
- Provide resource development assistance and tools to small nonprofit organizations
- Support microlending programs for small businesses and entrepreneurs
- Provide technical assistance and mentorship to new business owners

Goal 3.3b: Implement Individual Development Account (IDA) programs in 50 new communities across the region.

Initiatives include:

- Partner with local nonprofits to administer IDA programs
- Provide matching funds for IDAs to incentivize savings
- Advocate for state policies that support and expand IDA programs



Action Plan

YEAR 1

March 2025 - February 2026

- Conduct comprehensive needs assessments in target communities across Mississippi, Louisiana and Arkansas
- Develop comprehensive job descriptions for all positions to ensure clarity of responsibilities and share them with each employee
- Establish baseline metrics for all strategic goals
- Launch a region-wide awareness campaign about the Foundation's new strategic priorities

Specific actions:

- Organize a listening tour across the Delta region to gather community input
- Schedule a series of meetings with department heads to review and update existing job descriptions, ensuring they align with current roles and strategic goals
- Complete and post a clean audit to fully resume operations and fund development in all three states
- Upgrade online grant application portal to improve user experience for applicants
- Implement new financial compliance measures
- Assess current IT systems and implement integrated accounting and payroll systems



Action Plan

YEAR 2

March 2026 - February 2027

- Evaluate and refine pilot programs based on first-year results
- Expand successful initiatives to additional communities
- Develop and launch a grantmaking strategy aligned with strategic priorities
- Implement a data collection and analysis system to track progress on all goals
- Host a Mid South Regional Summit to foster collaboration and share best practices

Specific actions:

- Recruit board members from served communities to enrich representation
- Implement annual field learning trips for board members
- Expand funding criteria to include younger demographics, particularly boys of color
- Develop a digital transformation plan
- Create tech literacy programs for staff and grantees



Action Plan

YEAR 3

Milestone Year

March 2027 - February 2028

- Conduct mid-term evaluation of strategic plan progress
- Scale up high-impact programs across the region
- Launch an innovation fund to support creative solutions in target areas
- Strengthen advocacy efforts to influence policy changes aligned with strategic goals
- Develop a regional leadership program to build capacity in nonprofit and community sectors

Specific actions:

- Formalize partnerships with other regional foundations to maximize impact
- Expand grantmaking outreach to new geographic regions and demographic markets
- Implement flexible grantmaking practices for emergency/natural disasters and innovative projects
- Invest in a highly skilled IT team to oversee and secure the organization's growing technological infrastructure



Action Plan

YEAR 4

March 2028 - February 2029

- Intensify efforts in areas showing slower progress
- Implement cross-sector initiatives that address multiple strategic priorities simultaneously
- Launch a public-private partnership initiative to leverage additional resources
- Conduct an in-depth impact assessment of major programs
- Host a Regional Summit showcasing the progress and innovation of FMS and other regional funders

Specific actions:

- Develop and implement a long-term branding strategy and public communications plan
- Establish college internship programs to engage younger populations
- Build more corporate relationships and stronger partnerships with community foundations
- Implement data-driven decision-making processes across the organization
- Develop clear impact measurement metrics integrated into grant application and reporting processes



Action Plan

YEAR 5

March 2029 - February 2030

- Begin development of the next 3-year strategic plan
- Celebrate and publicize achievements and success stories from the past five years
- Conduct a comprehensive evaluation of all programs and initiatives
- Refine and adjust goals based on evaluation results and emerging needs
- Strengthen sustainability plans for successful programs

Specific actions:

- Review and adapt policies addressing investment strategies, donor acceptance, climate resilience, data equity, and other critical areas
- Stress-test and secure cyber and data resilience, financial controls, and board governance
- Develop a proactive communications strategy to defend programmatic pillars if necessary
- Build financial reserves and invest in policy analysis to prepare for potential external scrutiny
- Conduct a comprehensive SWOT analysis to inform the next strategic plan

KPIs, Budget & Monitoring



OVERALL KEY PERFORMANCE INDICATORS (KPIs)

- Percentage improvement in high school graduation rates
- Number of students enrolled in college from underserved communities
- Reduction in obesity rates across the region
- Number of new affordable housing units created
- Percentage decrease in unemployment rates
- Number of families with established emergency savings
- Number of social entrepreneurs supported, launched and sustained
- Number of new nonprofit organizations launched and sustained
- Amount of additional funding leveraged through partnerships and grants



BUDGET ALLOCATION

- Education Initiatives: 30%
- Health and Wellness Programs: 25%
- Economic Development: 45%
 - Community Development Projects: 25%
 - Wealth Building Strategies: 20%



MONITORING AND EVALUATION

- Quarterly progress reviews of all initiatives
- Annual comprehensive evaluation of strategic plan progress
- Mid-term (2.5 year) in-depth assessment and strategy refinement
- Final impact evaluation at the end of the 5-year period



Strategic Plan Summary Chart

Year	Key Focus Areas	Major Initiatives	Expected Outcomes
2025-2026	<ul style="list-style-type: none">Needs assessmentBaseline metricsAwareness campaignPartnershipsPilot programs	<ul style="list-style-type: none">Listening tourClean auditIT upgradesFinancial complianceJob description development	<ul style="list-style-type: none">Listening tourClean auditIT upgradesFinancial complianceJob description development
2026-2027	<ul style="list-style-type: none">Program refinementExpansionUpdated grantmaking strategyData systemsRegional summit	<ul style="list-style-type: none">Board recruitmentField learning tripsExpanded funding criteriaDigital transformation	<ul style="list-style-type: none">Increased program reachImproved data-driven decision-makingEnhanced board diversity
2027-2028	<ul style="list-style-type: none">Mid-term evaluationProgram scalinginnovation fundAdvocacyLeadership development	<ul style="list-style-type: none">Regional partnershipsFlexible grantmakingIT team investment	<ul style="list-style-type: none">Increased regional impactImproved organizational efficiencyEnhanced innovation capacity
2028-2029	<ul style="list-style-type: none">Cross-sector initiativesPublic-private partnershipsImpact assessmentRegional Summit	<ul style="list-style-type: none">Branding strategyInternship programsCorporate partnershipsImpact measurement metrics	<ul style="list-style-type: none">Increased visibilityImproved stakeholder engagementEnhanced impact measurement
2029-2030	<ul style="list-style-type: none">Next strategic planComprehensive evaluationGoal refinementSustainability planning	<ul style="list-style-type: none">Policy review and adaptationCyber and data resilienceCommunications strategyFinancial reserves	<ul style="list-style-type: none">Refined strategic directionImproved organizational resilienceEnhanced long-term sustainability



Appendix

Key References

- **Mississippi:**
 - [MAAP Assessments](#)
 - [State Health Improvement Plan](#)
- **Louisiana:**
 - [Master Plan for Higher Education](#)
 - [Healthy State Workforce Report](#)
- **Arkansas:**
 - [ARCHES Health Survey](#)
 - [Economic Recovery Strategy](#)





Regional and National Benchmarking Resources

Regional and national benchmarks were identified for the Mid South region, particularly focusing on Mississippi, Louisiana and Arkansas:

1. Health Rankings:

- Arkansas ranks 48th out of 50 in overall health and 49th in health of women and children [resource link](#)
- Arkansas ranks 47th in infant mortality and 46th in child mortality [resource link](#)
- Mississippi, Louisiana and Arkansas are among the lowest-ranked states for overall health system performance [resource link](#)

2. Education:

- Arkansas has been recognized for implementing all 18 of ExcelinEd's early literacy fundamental principles, along with Louisiana and North Carolina [resource link](#)
- Louisiana's 4th graders were ranked No. 1 in the nation for reading growth on The Nation's Report Card [resource link](#)

3. Economic Indicators:

- The Mid South Delta Region faces challenges including limited population and economic expansion, low educational attainment, a limited pool of skilled workers, high rates of poverty, and low community capacity [resource link](#)
- There is a significant disparity in earnings between rural and urban areas, with urban residents earning on average 19% more than rural residents in Arkansas [resource link](#)

4. Social Determinants of Health:

- Rural regions in Arkansas have higher rates of infant mortality, obesity, food insecurity, and child poverty compared to urban areas [resource link](#)
- Arkansas has 14 rural counties with "persistent poverty" and "persistent child poverty" [resource link](#)



Regional and National Benchmarking Resources | Cont.

5. Access to Services:

- In Arkansas, 7,153 homes lack complete plumbing, 11,744 are without kitchens, and 67,187 are without a method of transportation [resource link](#)

These benchmarks highlight the significant challenges faced by the Mid South region in health, education, economic development, and access to basic services, underscoring the need for targeted interventions and strategies to improve outcomes in these areas.

Additional Information

Health Outcomes

- Higher premature mortality rates, particularly in states like New Mexico, Arkansas, Kentucky, Mississippi, and West Virginia [resource link](#)
- Shorter life expectancy, with the U.S. overall having the lowest life expectancy (77.5 years) among 10 high-income countries [resource link](#)
- Higher rates of avoidable deaths, with Arizona, Louisiana, Mississippi, New Mexico, and Texas experiencing over 35% increase in avoidable mortality rates between 2019 and 2021 [resource link](#)

Access to Care

- Higher uninsured rates, with Texas having the highest rate of uninsured adults at 24.3% in 2021 [resource link](#)
- Limited Medicaid expansion, with states like Mississippi, Georgia, Wyoming, Oklahoma, and Texas not expanding Medicaid eligibility under the Affordable Care Act as of 2021 [resource link](#)
- Nevada, Arizona, Alaska, Georgia, and Texas ranked as the worst states for access to care [resource link](#)



Regional and National Benchmarking Resources | Cont.

Health Care Costs

- Higher private health insurance premiums, with West Virginia having the fourth-highest average premiums at \$10,563 per year [resource link](#)

Overall Rankings

- The lowest-ranked states overall are Arkansas, Texas, Oklahoma, West Virginia, and Mississippi [resource link](#)
- West Virginia ranks as the worst state for health care in the nation, with the worst health outcomes despite ranking second for accessibility [resource link](#)