



Foundation for Youth Investment

Draft Strategic Plan October 2014 – September 2016

Prepared by Olive Grove Consulting

In partnership with Foundation for Youth Investment

11/25/14



FOUNDATION
for
YOUTH INVESTMENT

October 1, 2014

Dear Friends,

This is an exciting time for the Foundation for Youth Investment! It is hard to believe that it has been just over a year since we received a generous grant from the Pacific Forest and Watershed Lands Stewardship Council that allowed us to continue operating as an independent organization. As part of our legacy, we are excited to continue youth grantmaking and support of strategic initiatives that connect youth to nature. We are equally thrilled to think about this next chapter for our organization and how we can grow our capacity to support and elevate the entire sector, to ensure that all of California's youth have the opportunity for meaningful experiences in nature.

As we look forward, we are pleased to present this Strategic Plan to our partners and supporters. This plan represents the collective work of our board, partners and staff, as well as widespread input from friends like you. As you read through this plan you will see our updated mission statement, our new vision statement and values. The Foundation for Youth Investment is also pleased to present our 2014-2016 strategic priorities and the goals associated with each one.

We are truly thankful to each of you for your patience, support and encouragement. We hope you will be as inspired and energized as we are—both for the health and well-being of our youth today and for the future stewardship of our planet tomorrow.

Sincerely,

Jayne Battey

Board Chair, 2014

Kim Moore Bailey

Executive Director

Table of Contents

I. Executive Summary	4
II. Mission, Vision and Core Values	7
III. Background	3
a. Milestones and Impact	8
b. Current Activities	9
c. Investment Approach	9
d. FYI Initiatives	9
IV. Objectives for the Process	11
V. Methodology and Timeline	12
VI. Key Findings	13
VII. Strategic Priorities and Goals	17
VIII. Building Organizational Capacity: Key Investments Required	19
IX. Conclusion	20
Appendix A. Strategic Plan Participants	21
Appendix B. Draft Strategic Work Plans	23

I. Executive Summary

There is great value in promoting and supporting meaningful experiences in nature for youth. From an initial, meaningful interaction to the development of an outdoor enthusiast, the Foundation for Youth Investment (FYI) aspires to see that all youth have this opportunity. From the beginning, FYI has been focused on supporting outdoor youth programs, recognizing that these experiences support the overall health and well-being of youth, and ideally inspire a lifetime of connection and appreciation for the great outdoors.

In 2010, the Pacific Forest and Watershed Lands Stewardship Council (SC) created FYI to continue its legacy of youth grantmaking and strategic initiatives, and to establish a sustainable funding source for youth development in Northern California. In 2013, the Foundation for Youth Investment received a generous grant from the Stewardship Council that allowed FYI to continue operating as an independent organization. Collectively these two organizations have awarded over \$13 million in grants to organizations that have positively impacted the lives more than 300,000 youth through outdoor programs.

Since gaining its new independence, FYI is just finding its footing. With the new hire of Kim Moore Bailey as Executive Director in January 2014, the board and leadership are ready to look ahead. In June 2014, they made the decision to engage in a strategic planning process—realizing that it was time to focus its message, clarify its impact, and begin the process of becoming a sustainable and relevant stand-alone organization.

Olive Grove Consulting was hired to develop a two-year strategic plan that builds capacity for the organization and helps to clarify its vision, goals, and strategies. The comprehensive planning approach included discovery and research, strategic assessment, and the identification of goals and key benchmarks for success—all critical to becoming a more sustainable and impactful organization long-term.

The process was driven by the executive director with support from the board and input from 23 stakeholders including past and current board members, grantees, thought-leaders in the sector, current and prospective funders, and peer organizations. Key findings indicated that stakeholders are positive and hopeful about FYI's future, and are looking for the organization to step into a leadership role in the sector. They care about FYI's mission and singular focus on connecting youth to nature, and appreciate that FYI's grantmaking plan is not too narrowly defined by education standards.

Stakeholders also shared the challenges FYI has experienced in the past with multiple staff changes, inconsistent follow-through on initiatives, a cumbersome grant application process, and a lack of clarity about its identity separate from the Stewardship Council.

Stakeholders are aware that fundraising will be a challenge, and hope that FYI will not compete for funding with its grantees. There is concern about barriers to access for underrepresented youth, the current lack of diversity in outdoor leadership, as well as whom tomorrow's stewards of the planet will be.

Overall, stakeholders are looking to the future and see FYI as the organization that can be a catalyst to bring people together and attract and rally support for connecting youth to nature, as well as lead the cultural relevancy conversation and determine model issues. Stakeholders are asking for opportunities to collaborate, gather data to demonstrate the collective impact of the field, and share best practices. They see the Foundation for Youth Investment as being the leader for a cause that demands immediate attention and action—both for the health and well-being of our youth today and for the future stewardship of our planet tomorrow.

“I hope that FYI will be the premier foundation acting as the voice, advocate and champion for working with kids in the woods, supported by big portfolio of national and governmental players, and with a steadily growing major gifts program. I think there's opportunity there! No one else has grabbed the box and stood on it.”

Strategic Priorities 2014 – 2016

FYI is now clear about its niche and positioning in the sector. It has stepped into a critical role as the only foundation that is exclusively working to eliminate barriers and provide resources to promote meaningful experiences in nature for youth. It is also clearly evident that FYI is perceived as the leader that can ignite momentum, attract resources, and rally support for a cause that demands attention and action. With this in mind, the following three strategic priorities were determined as a focus for the next two years.

Build FYI's internal and external capacity to fulfill its mission.

Intent: To ensure the long-term sustainability and continued relevance of the organization.

Invest in the cultural relevancy movement impacting the field by supporting grantee capacity building and cultural competency, and share best practices to elevate the sector and address critical barriers.

Intent: To magnify FYI's financial investment, promote diversity in the field, outdoor quality programming, and ensure equity and access in participation.

Be known as an expert, leader, and champion for promoting the benefits of connecting underrepresented youth with nature.

Intent: To build greater awareness of and support for the collective impact of connecting youth with nature.

This strategic plan captures the first two years of what is required to establish FYI as a leader and champion for connecting youth with nature. The execution of this vision will not be possible without outside investment and support that reaches beyond those interested in outdoor programming, to new partners in the conservation and health fields, and to those who are committed to creating access and pathways that are culturally relevant. It requires an internal investment in capacity building for both FYI and its grantees in order to elevate the sector and address critical barriers. Grounded yet visionary, the Foundation for Youth Investment has the potential to lead the way.

II. Mission, Vision and Core Values

FYI has updated its vision, mission and core values to better reflect its new strategic priorities and vision for the future.

Vision

Our vision is for all youth to have the opportunity for meaningful experiences in nature.

Mission

We connect youth to nature by eliminating barriers, providing resources, and promoting outdoor programming as essential for building healthy lives and inspiring future stewards of the planet.

Core Values

Diversity - From our staff to our board to our grantees, we value diversity and strive to be inclusive.

Attentiveness - We listen and learn so that we can remain relevant and effective, using our leadership role to address needs as they arise.

Life-Changing - We expect more of our work, navigating new pathways to transform the way youth interact with, appreciate, and care for the outdoors; and likewise, challenging and supporting our staff so that their experience with the Foundation is the best and most meaningful of their career.

Flexibility - Our leadership role demands that we adapt with an open mind and heart, keeping lines of communication open, and making adjustments to achieve shared goals and to embrace opportunities.

Catalyst - We ignite momentum, attract resources, and rally support for a cause that demands attention and action.

Stewardship - We practice prudent stewardship of our financial resources and the resources of the planet in order to serve future generations of youth and to honor the trust of our donors.

Integrity - We demonstrate transparency and equity in our decision making and in all of our internal and external affairs.

III. Background

The Pacific Forest and Watershed Lands Stewardship Council (SC) created the Foundation for Youth Investment (FYI) in 2010, to continue its legacy of youth grantmaking and strategic initiatives, and to establish a sustainable funding source for youth development in Northern California.

On August 1, 2013, after two years of successfully administering the SC's grantmaking program and initiatives—with the focus of connecting underrepresented youth and young adults to nature, parks, open spaces and the outdoors—the Foundation for Youth Investment received a generous grant from the Stewardship Council that allowed FYI to continue operating as an independent organization. To ensure compliance, the SC and FYI agreed to a set of parameters as defined in the Major Grant Agreement. The \$10,760,000 grant fulfilled the requirement to provide seed money to establish a permanent program to connect youth to the outdoors, and the Major Grant Agreement guides the grantmaking activities for FYI through 2022.

As the Foundation for Youth Investment thinks strategically about the future, the following are requirements the organization must follow per the Major Grant Agreement:

- The grant period is defined from 2014-2022.
- The Foundation for Youth Investment is required to utilize grant funds to provide greater resources to connect youth, and young adults in the Pacific Gas and Electric service territory to nature, parks, open spaces and the outdoors, and will particularly serve the needs of underrepresented youth.
- No more than 30% of FYI's total expenditures of the Original Principal Amount can be used to cover overhead expenses.
- Annually during the grant period, FYI will award no less than \$500,000 in Program Grants to connect underrepresented youth to the outdoors.
- FYI will award no less than a total of \$500,000 for infrastructure projects during the grant period.

a. Milestones and Impact

The Foundation for Youth Investment has built on the work of the Stewardship Council; collectively these two organizations have awarded over \$13 million in grants to support organizations that positively influence the lives of youth through outdoor activities. Since 2006, these outdoor programs report that more than 300,000 youth have been impacted through life changing outdoor experiences.

As an example, we have supported programs like the Bay Area Wilderness Training, a program that empowers teachers and youth workers to integrate outdoor and environmental education curriculum into their program. Through low cost wilderness leadership courses, free gear lending libraries, and financial and logistical support, these leaders are given the confidence, equipment, and tools to bring youth into the outdoors and provide enriched learning experiences.

Another example is the Watsonville Wetlands Watch program. They conduct weekly field trips to the wetlands for 125 middle school youth who are mentored by high school students trained in wetland activities. This fosters environmental stewardship among youth by building their personal connection with the wetlands. These two examples highlight both the broad and deep impact our grantmaking has had in supporting these life changing, outdoor activities.

b. Current Activities

Concurrent to its strategic planning process, FYI is conducting a rebranding exercise to establish a unique identity separate from the Stewardship Council. Also this year, FYI took a thoughtful look at its grantmaking program to further align the program with the impact FYI is seeking to achieve. Most recently, the FYI offices were relocated to Oakland, CA and the organization is actively looking to onboard new staff to help implement its new strategic plan.

c. Investment Approach

FYI has been and will continue to be committed to investing in organizations that connect underrepresented youth to nature. Over the years, our investment approach has been modified to reflect improvements suggested by grantees. The Foundation for Youth Investment has granted funds to both large and small organizations and supported specific activities that addressed the widely recognized barriers that prevent youth from connecting to the outdoors. In 2014, FYI engaged in an invitation only process to allow it to step back during the strategic planning process and plan for future grantmaking cycles.

d. FYI Initiatives

In addition to supporting direct program delivery, the Foundation for Youth Investment has taken a leadership position in tackling some of the barriers that have prevented youth from engaging in the outdoors. These projects or initiatives have supported conversations, sparked new programming and allowed the field as a collective to move ahead on certain areas. Initiatives that FYI has supported in the past include:

- *Cultural Relevancy - Making the Outdoors Inclusive and Relevant* - this body of work focused on five identified areas (staffing, community, youth & family, board of directors and curriculum) that organizations felt were not accurately reflecting the diverse communities they were serving. FYI committed to leading the effort in developing a roadmap to cultural relevancy for organizations providing outdoor education experiences for youth with diverse backgrounds and experiences. From trainings for current staff and board leadership to supporting an intensive workforce development initiative, FYI is focused on developing the next generation of culturally relevant, highly skilled, outdoor youth programs.
- *Outdoor Trips Fund* - Field trips enrich the lives of students and yet one of the biggest obstacles for schools is transportation. The Outdoor Trips Fund is designed to help schools in lower income communities secure transportation funds for field trips focused on science or environmental education programs. FYI and partners from the Environmental Education Funders Collaborative launched the program in 2011. In the first two years of the program, the transportation fund sponsored over 260 field trips, paid for over 380 buses, and facilitated the participation of field trips for over 15,000 students.

IV. Objectives for the Process

Olive Grove Consulting was hired in June 2014, to develop a two-year strategic plan that builds capacity for the organization and helps to clarify its vision and priority strategies. The comprehensive approach included discovery and research, strategic assessment, and the identification of goals and key benchmarks for success—all critical to becoming a more sustainable and impactful organization long-term.

The process was driven by the executive director with support from the board, and solicited input from multiple stakeholders including past and current board members, grantees, thought-leaders in the sector, current and prospective funders, and peer organizations. In our discussions we outlined a number of outcomes that we hoped to accomplish:

- An understanding of FYI's **current perceived role** and reputation in the community
- Identification of key **strengths, challenges, opportunities and decision points** facing the organization
- Identification of **major environmental factors**, shifts or dynamics that may impact FYI's strategic focus or decisions
- An affirmation or revision of the **organization's vision** and role in outdoor youth development
- The establishment of **capacity building priorities** to address the identified needs and opportunities
- Development of **goals and strategic initiatives** to fulfill the vision
- Revitalization of the **board's engagement** and community/funding stakeholders in fulfillment of FYI's capacity building needs
- A **strategic plan** document
- A **work plan** that outlines specific goals, activities, outcomes and a timeline to support the implementation of the strategic plan
- Establishment of a **monitoring system** that defines metrics and identifies accountability mechanisms for measuring the effectiveness of each strategy over time

“We are not standing firm in a particular lane or alley and there’s nervousness to be more narrow. In the absence of clarity, our future is not currently well defined.”

V. Methodology and Timeline

Olive Grove Consulting engaged the FYI board of directors, staff, stakeholders and other consultants to provide valuable input and leadership throughout the planning period. The process was divided into three phases:

<p>June - July 2014</p>	<p>DISCOVERY</p> <ul style="list-style-type: none"> • Meetings with Executive Director • Internal Data Review • Determine key questions to be addressed • Identify and prioritize internal and external stakeholders • Develop assessment tools • Stakeholder Interviews • Grantee focus group • Written summary of assessment
<p>August 2014</p>	<p>DISCERNMENT & DECISIONMAKING</p> <ul style="list-style-type: none"> • Planning retreat with ED and consultant to review findings, explore options and scenarios and make decisions • Determination of strategic directions
<p>September 2014</p>	<p>DOCUMENTING AND DOING</p> <ul style="list-style-type: none"> • Draft strategic plan document created • Finalize mission, vision statement • Development of a work plan and metrics for each strategic direction • Present findings and preliminary plan to the board of directors • Make modifications if necessary • Final plan approved and adopted by the board

VI. Key Findings

As part of the strategic planning process, Olive Grove Consulting reviewed more than 20 internal documents and reports, collaborated with development and branding consultants, and conducted 14 individual stakeholder interviews with board members, grantees, thought-leaders in the sector, current and prospective funders, and peer organizations. Olive Grove also led a focus group consisting of 9 current and former grantees. The following summarizes the key findings.

Strengths/ What's Unique about FYI

- Niche and mission, singular focus on youth outdoors
- Advisory group for grants program
- Opportunities for networking and collaboration
- Transportation fund
- Flexibility
- Funding for capital improvement
- Bring issue of not funding this field into sharper view and why its important
- Diversity of board and staff + foundation focus on diversity
- Empower young people, build leaders in underserved communities
- Support of community-based organizations

“FYI is a great networking organization, bringing like-minded organizations together. I liked when they held their summit and focus groups at Fort Mason – really great.”

“FYI looks to fill a niche - getting youth outdoors, helping them to be better human beings. Big fish in a small pond.”

Challenges:

- Have not followed through on some initiatives, e.g. standardization of research, website sharing of information, next steps with cultural diversity efforts, etc.
- Inconsistent staff and leadership
- Cumbersome grant application / lack of clarity
- Fundraising
- Spin-off from stewardship council has been confusing
- Clarity in messaging / too broad without clear direction
- Outdoor Educator Institute – questionable return on investment

- Career development in outdoor industry
- Worry that outdoor education will get too narrowly defined by education standards, science standards, etc.
- Be careful not to spread ED and Board too thin (especially when considering policy/advocacy work)

“FYI is most challenged in defining what they are doing clearly and targeting who the magic body is that wants to fund it.”

“We are making impacts but the field doesn’t see those impacts yet – we’re not a force in any particular direction.”

Opportunities:

- Step into leadership role within experiential outdoor education field
- Determine model issues, bring people together, be a catalyst
- Increased collaboration, trainings and workshops for community leaders, help with capacity building
- Be an expert in the field and resource to other funders and policymakers
- Help build relationships within the sector and outside the sector for additional support
- Have multiple touch points with grantees, more interaction
- Connect with conservation organizations – tomorrow’s stewards
- Be transparent as an organization

“I would love to see them as a thriving, larger organization that’s well connected with conservation organizations. They could be helping develop the future stewards of the land, helping support that and respected by the conservation groups as getting youth out in nature.”

“They could be the spokesperson for the entire industry. To some extent they play that role on a regional basis, with a national opportunity.”

“FYI is not going down the same road right now . . . not pushing environmental education, just focusing on youth leadership and development. And we appreciate that. We don’t feel like every outdoor organization needs to be doing education.”

Threats:

- Budget cuts at federal and state parks where outdoor education programs are run.
- Confusion between outdoor access and environmental education.
- Competition for funding with organizations that are more cutting edge or have social entrepreneurship with diverse business models.

- Youth development in the outdoors not being viewed to be as important as technology, etc.
- Outdoor education becoming too narrowly defined by education standards, science standards, etc. It's a threat where STEM becomes a fad and everyone lines up behind it.

Trends:

- Time in outdoors as part of healthy initiatives, healthy lifestyle
- Potential of technology and innovation to solve environmental problems
- Professionalization of the industry
- Community workforce development
- Common Core Curriculum and STEM
- Retirement of environmental leaders
- Concern about diversity in outdoor industry

Grantees' biggest issues and need for support:

- Organizational capacity building
- Unrestricted general operating funds
- Funding for trainings / professional development for staff
- Research and tools to make the case for getting youth outdoors
- Technical assistance to strengthen impact and evaluation metrics
- Long-term evaluation and tracking of metrics/data
- Multi-year funding for operational support
- Opportunities for collaboration and networking
- Transportation and advocacy with public transit
- Space for trainings

Hope for FYI 3 years from now

I hope that they will have clearly established their mission and purpose and be offering multi-year funding to organizations that are invited to apply, and that there is a program officer or a contact person who understands what's being funded and is an available resource to the grantees.

They are able to stay focused on outdoor education to the degree that they have so far and not fall victim to the STEM trend. Stay open to outdoor education, recreation, first-time exposure to the outdoors; people don't have to do science. Pushing themselves physically, mentally and emotionally – learning about themselves, their peers, learning new behaviors and becoming greater people.

In the grants I hope we can build enthusiasm at a global level where we want to serve. That spark, an opportunity and a future with an enthusiasm among grantees and others come to us and ask how they can do it and help out as well. Be the conduit for convening, teambuilding and organizations out there. See the sparks out there everywhere – people coming to us and wanting to participate in a meaningful way.

What do you hope will have stayed the same?

- Keep same geographic influence (Northern California)
- Empower diverse leaders, community-based
- Same ED
- Board stays passionate and down to earth
- Real thoughtfulness about grant making and the evaluation process
- Continue to fund capital projects - very important
- The passion and the kids
- Its heart and commitment to serve!

VII. Strategic Priorities and Goals, October 2014 - September 2016

FYI is now clear about its niche and positioning in the sector. It has stepped into a critical role as the only foundation that is exclusively working to eliminate barriers and provide resources to promote meaningful experiences in nature for youth. It is also clearly evident that FYI is perceived as the leader that can ignite momentum, attract resources, and rally support for a cause that demands attention and action. With this in mind, the following three strategic priorities were determined as a focus for the next two years.

Build FYI's internal and external capacity to fulfill its mission.

Intent: To ensure the long-term sustainability and continued relevance of the organization.

Goals/Activities

- FYI locates and moves into new offices with features to better serve grantees.
- Internal systems are upgraded.
- A program officer is hired.
- A development officer is hired.
- An achievable fundraising plan is created and executed.
- FYI engages in on-going board and staff development.

Invest in the cultural relevancy movement impacting the field by supporting grantee capacity building and cultural competency, and share best practices to elevate the sector and address critical barriers.

Intent: To magnify FYI's financial investment, promote outdoor quality programming and ensure equity and access in participation.

Goals/Activities

- Special initiatives and investments to tackle the cultural relevance barrier across the sector.
- A clear, efficient process for grantmaking is established.
- A third party evaluation consultant is engaged to help with metrics and data gathering.
- Technical assistance and trainings address specific needs of the grantees and other outdoor program staff.

- Convenings and conferences share research and best practices, gathering information to inform/address barriers, etc.
- Individual technical assistance and consulting is provided to grantees and prospective grantees.

Be known as an expert, leader and champion for promoting the benefits of connecting underrepresented youth with nature.

Intent: To build greater awareness of and support for the collective impact of connecting youth with nature.

Goals/Activities

- Collaborations with larger foundations, associations and other entities help secure investment and support for FYI and the sector.
- Facilitates and participates in ongoing conversations addressing the need for more cultural diversity in the field.
- FYI shares knowledge and information about the health benefits of getting youth outdoors.
- New branding and messaging is created that clearly positions FYI in the sector.

VIII. Building Organizational Capacity & Implementing the Vision: Key Investments Required

To achieve the ambitious strategic goals outlined in this plan, FYI will need to make key investments to ramp up activity across every function of the organization to include two new staff positions; increased fundraising and outreach; implementation of cultural relevancy programs; grantee technical assistance and convenings; upgrades in systems and operations; and an engagement with an evaluation consultant to help with metrics and data gathering. FYI will also provide new opportunities for professional development for Board and staff to meet their needs for continued growth to serve the organization more effectively.

To ensure the collective work of the Foundation for Youth Investment can be achieved, development efforts will be organized around three program strategies aimed at giving all of California's youth opportunities to experience the out-of-doors. These three primary program areas are:

- First Encounters Fund – gives young people transformative encounters with nature – a trip to the ocean, the first look at Yosemite, a first night sleeping under the stars.
- Cultural Relevancy Programs – FYI collaborates with local, regional and national environmental organizations making systemic changes in their boards, staff and programs to diversity the communities they serve. FYI provides convenings, exchange of best practices and individual coaching to assist them in becoming more culturally relevant.
- Emerging Stewards – many successful community-based organizations that work with underserved youth need resources and support to integrate environmental experiences into their programming. FYI provides grants and technical assistance to build their capacity to bring the youth they serve outdoors.

The key investments projected for the next two years represent a budget increase that will be met through growing contributed income from individuals and foundations in support of FYI's program strategies. In order to invest in others, it is essential that FYI invests in itself. As FYI continues to define its focus and measure the impact, the intention is that there will be greater momentum to support its efforts moving forward.

IX. Conclusion

In just a short time as an independent nonprofit, FYI has already achieved notable success with the hiring of Kim Moore Bailey as Executive Director, the establishment of a very committed and forward-thinking board of directors, and an almost completed assessment of the grantmaking program for increased clarity and impact. In addition, FYI stakeholders have communicated that they are inspired, hopeful and supportive of FYI's mission and its potential to be a leader and catalyst for a cause that demands immediate attention and action today, and in the decades to come.

This plan captures the first two years of what is required to establish FYI as a leader and champion for connecting youth with nature. The execution of this vision will not be possible without outside investment and support that reaches beyond those interested in outdoor programming, to new partners in the conservation and health fields. It requires an internal investment in capacity building for both FYI and its grantees, to help elevate the sector and address critical barriers. Grounded yet visionary, FYI has the potential to lead the way.

Appendix A. Strategic Plan Participants

Stakeholder Interviews

Kim Moore Bailey, Executive Director, FYI

Jayne Batten, FYI Board Member (President) / CEO, Miramar Farms

Josh Brankman, Executive Director, California Outward Bound

Angie Chen, Consultant, Director, Blue Sky Funders Forum

Sarah Cupery Ottley, Director, Adventure Risk Challenge (ARC)

Taara Hoffman, Executive Director, Girl Ventures

Jennifer Isacoff, Director, Parks for People – Bay Area Program, Trust for Public Land

Kyle Macdonald, CEO, Outdoors Empowered

Rue Mapp, CEO, Outdoor Afro

Dan Martin, FYI Board Member (Vice President)

Lisa Mattis, Principal, Catalyst Philanthropy, Previous Executive Director, Big City Mountaineers

Nina Roberts, Ph.D., Professor, San Francisco State University

Michael Schonherr, Board Member (FYI & Stewardship Council), Pacific Gas & Electric

Allene Zanger, Executive Director, Pacific Forest & Watershed Lands Stewardship Council

Focus Group Participants

Eric Aaholm, Executive Director, Youth Enrichment Strategies

Teresa L. Arriaga, Executive Director, Seven Tepees Youth Program

Elizabeth Carmody, Community Outreach Coordinator, East Bay Regional Park District

Steven Fredericks, Director of Development, Bay Area Wilderness Training

Anders Fristedt, California Program Director, Big City Mountaineers

Jose Gonzales, Founder & Director, Latino Outdoors

Jared Lawson, Co-Founder & Co-Director, Pie Ranch

Drew McAdams, Chief of Programs, Pacific Leadership Institute

Bettina Mok, Regional Program Director, Student Conservation Association

Consultant: Debra McKnight Higgins, Olive Grove Consulting

Appendix B. Draft Strategic Work Plan

Strategic Priority #1: **Build FYI's internal and external capacity to fulfill its mission.**

Intent: To ensure the long-term sustainability and continued relevance of the organization.

Goal/Outcome	Action Steps	Timeline/Deadline	Leadership/Who's Responsible	Specific Resources Required	Success Indicators
<p>GOAL #1</p> <p>FYI locates and moves into new offices with features to better serve grantees.</p>	<p>Research new offices.</p> <p>Secure new lease.</p> <p>Purchase office furniture, move and get all systems up and running.</p>	<p>August/ September 2014</p>	<p>ED</p>	<p><u>Financial investment:</u></p> <ul style="list-style-type: none"> • Moving expense, furniture and supplies <p><u>Human capital:</u></p> <ul style="list-style-type: none"> • Staff time 	<p>New affordable offices are secured that serve the needs of FYI and its grantees.</p>
<p>GOAL #2</p> <p>Internal systems are upgraded.</p>	<p>Research and purchase new donor database.</p> <p>Research and purchase grants database system.</p> <p>Set up and train staff on both systems.</p>	<p>Summer/ Fall 2014</p> <p>Fall/Winter 2014/15</p> <p>By June 2015</p>	<p>ED and Senior Program Administrator</p>	<p><u>Financial investment:</u></p> <ul style="list-style-type: none"> • New Software, training <p><u>Human capital:</u></p> <ul style="list-style-type: none"> • Staff time 	<p>A new donor base is implemented.</p> <p>A grants management system is implemented.</p>
<p>GOAL #3</p> <p>A Program Officer is hired.</p>	<p>Job description is circulated, application process is facilitated and a program officer is hired by mid November</p>	<p>November 2014</p>	<p>ED, Board Members</p>	<p><u>Financial investment:</u></p> <ul style="list-style-type: none"> • Salary • Benefits • Equipment <p><u>Human capital:</u></p> <ul style="list-style-type: none"> • Staff time 	<p>New Program Officer is hired</p>

<p>GOAL #4</p> <p>A new Development Officer is hired</p>	<p>Job description is circulated, application process is facilitated and a development officer is hired by January 2015</p>	<p>January 2015</p>	<p>ED, Board Members</p>	<p><u>Financial investment:</u></p> <ul style="list-style-type: none"> • Salary • Benefits • Equipment <p><u>Human capital:</u></p> <ul style="list-style-type: none"> • Staff time <p><u>Other resources:</u></p> <ul style="list-style-type: none"> • XXX 	<p>Development Officer is hired</p>
<p>GOAL #5</p> <p>An achievable fundraising plan is created and executed.</p>	<p>Work with Robert Glavin, Inc to complete plan, action steps and develop the case for future fundraising efforts.</p>	<p>Plan to be completed by October 2015. Year end giving launches the plan</p>	<p>Susan Jacobson and ED</p>	<p><u>Financial investment:</u></p> <ul style="list-style-type: none"> • Consultant fees <p><u>Human capital:</u></p> <ul style="list-style-type: none"> • Staff time <p><u>Other resources:</u></p> <ul style="list-style-type: none"> • Fundraising database implemented 	<p>Plan is completed by deadline.</p> <p>Year-end campaign goals are met/</p> <p>Fundraising goals are achieved annually.</p>
<p>GOAL #6</p> <p>FYI engages in on-going board and staff development.</p>	<p>On-going coaching for ED.</p> <p>Staff and board participate in trainings and workshops.</p> <p>Board job descriptions and committee charters are created—development, program, finance and audit.</p> <p>Staff and board team-building opportunities are planned annually.</p>	<p>On-going</p> <p>On-going</p> <p>May 2015</p> <p>Annual</p>	<p>ED</p> <p>Board/Staff</p> <p>Board Chair</p> <p>ED/Board Chair</p>	<p><u>Financial investment:</u></p> <ul style="list-style-type: none"> • Training opportunities <p><u>Human capital:</u></p> <ul style="list-style-type: none"> • Staff and board time 	<p>Board and staff feel confident in their roles.</p> <p>Annual staff reviews are positive.</p> <p>Board & Staff use self-assessment tools to inform additional training and support needed.</p>