

**Golden Gate Audubon Society - Strategic Plan**  
**January 2020-June 2023**



Adopted on November 26, 2019

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## **Executive Summary**

Having recently celebrated its Centennial year, Golden Gate Audubon Society is poised to have an even greater impact in the years and decades ahead. This Strategic Plan represents best effort to identify the combination of Goals, Strategies, and Investments needed to take the organization to the next level of effectiveness.

A few highlights of the Plan:

- Greater attention to moving people to participate in multiple organizational programs and activities, as described in the Plan's Theory of Change and within individual Strategies.
- The creation of one or more Strategic Initiatives over the life of the plan that will serve as a centerpiece or centerpieces around which the organization will prioritize its advocacy, education, habitat restoration, and communications.
- An increased focus on data and work planning, to make better informed tactical and strategic decisions, to align the organization's many teams around clear objectives and timelines for their yearly work flow, and to evaluate progress on the strategic plan as a whole.
- An increased attention to Diversity, Equity, and Inclusion, with the expectation that the organization's programs will become more welcoming, inclusive, and equitable, and the organization's people will increasingly reflect the racial, cultural, and economic diversity of the region.
- A series of Investments in development, conservation staff, community organizing, and youth education, to be made in a phased manner of 3-4 years as resources are secured.

This plan contains the following sections:

- Timeline and Terminology
- Mission
- Theory of Change
- Strategic Initiatives
- Goals
- Strategies
- Investments
- Work Planning, Measurements of Success, and Plan Updates
- Appendix A: Calendar of specific deadlines identified in the Plan
- Appendix B: Conservation Advocacy Priority-Setting Criteria
- Appendix C: Theory of Change – More Complete Explanation
- Appendix D: Conservation Advocacy Investment Additional Information

## Timeline and Terminology

### *Timeline*

This strategic plan runs from January 2020-June 2023, a period of 3 ½ years.

Year 1 is a half-year and refers to the second half of the 2019-2020 Fiscal Year (e.g. January-June 2020).

Year 2 refers to the 2020-2021 Fiscal Year.

Year 3 refers to the 2021-2022 Fiscal Year.

Year 4 refers to the 2022-2023 Fiscal Year.

To the extent an action is described as taking place during a specific Year, the expectation is it will occur at **some point** during the year, not necessarily at the beginning of the year.

### *Terminology*

**Mission** – A short statement identifying the unique role of the organization in pursuit of a better world.

**Goals** – Broad, long-term outcomes being sought. *Mission* Goals are in direct furtherance of the mission. *Institutional* Goals are aimed at enhanced organizational capacity.

**Strategies** – Major thrusts of activities that are in pursuit of one or more goals.

**Objectives** – Measurements of success or milestones in pursuit of Goals and/or implementation of Strategies.

**Theory of Change** – A short explanation of the core manner in which accomplishing the organization's goals via its strategies advances the organization's mission.

**Conservation Advocacy** – Activities designed to influence decision-makers with regards to their public policy, business practices, and/or behavior whether government, corporate, nonprofit, consumers, landowners, voters, or recreationists.

**Region** – the word “region” is being used to mean the specific territory that GGAS covers based on its agreement with National Audubon Society and its sister Audubon chapters.

## Mission

The Golden Gate Audubon Society engages people to experience the wonder of birds and to translate that wonder into actions that protect native bird populations and their habitats.

### Theory of Change (condensed version)<sup>1</sup>

GGAS's theory of change aims to explain how the organization's principle Goals and activities advance the Mission. The mission necessarily implies three steps:

- Step 1 – People are engaged.
- Step 2 – People experience the wonder of birds
- Step 3 – People translate that wonder into action to protect.

Of course, the process of moving from engagement to wonder and action isn't always linear, but rather participants move between these three steps over time back and forth.

In addition, some actions to protect are **planned**, while others are **sparked**.

- **Planned Actions:** GGAS interacts with an individual who takes an action that GGAS requests. For example, a field trip participant may sign up to participate in a habitat restoration event that GGAS is sponsoring in the following month.
- **Sparked Actions:** GGAS interacts with an individual (creating a sense of wonder) that prompts them to take an action unrelated to any specific GGAS request or activity. For example, a field trip participant may subsequently choose to speak out on a national bird conservation issue that GGAS does not address.

Lastly, some "actions to protect" are about enhancing the *capacity* of GGAS (e.g. donating, serving on a committee, participating in Birdathon, etc.), which provides resources by which GGAS can increase the numbers of people engaged in future months and years.

A diagram that explains the Theory of Change follows:

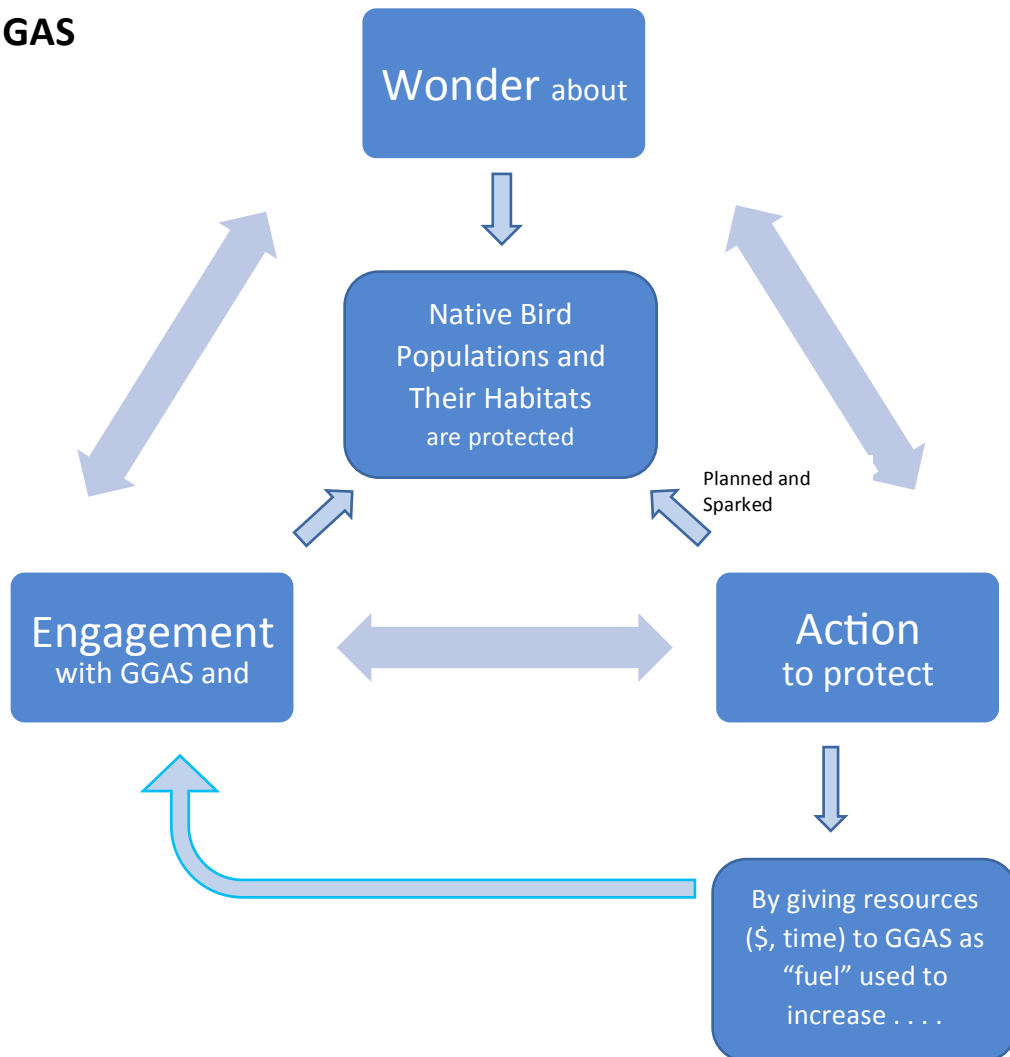
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<sup>1</sup> A more complete explanation of the Theory of Change is included as Appendix C.

**Without GGAS**

Threatened Native  
Bird Populations and  
Habitats

**With GGAS**



***Implications of the Theory of Change***

A few implications of the Theory of Change are reflected in the remainder of this Strategic Plan and should be taken into account when developing more specific work plans for staff and committees.

1. All GGAS activities should: (1) be clearly aimed within one or more of the boxes or (2) serve as one of the arrows, moving people from one box to another.

2. While GGAS already moves a large number of people between the boxes, it is almost certainly missing opportunities to move people through the process. Over the next 3-4 years, GGAS should become more intentional and efficient about this process.
3. In order to be more intentional, GGAS needs to generate data and/or use data from other organizations to determine over time which activities are most effective at moving people to deeper engagement, more wonder, and more action, both direct and indirect.

### **Strategic Initiative(s)**

Over the next three and a half years, Golden Gate Audubon will pursue one or two bird-focused Strategic Initiatives. The Strategic Initiative(s) will be used by the staff, board, and committees to: (1) help prioritize their work and (2) as a theme that will be used in GGAS communications.

**Priority-setting:** Staff and committees will be asked to identify and act on at least some opportunities to advance any Strategic Initiative during annual work planning. While the Strategic Initiative(s) will receive *extra* attention, GGAS staff and volunteers will continue to engage in a wide variety of activities unrelated to the Strategic Initiative.

**Communications:** GGAS communications staff will use the Strategic Initiative(s) as a theme that receives special emphasis within GGAS communications.

Selection of an initial Strategic Initiative will be made by the board no later than February 2020.

The most important criteria to be used in selecting a Strategic Initiative are:

- Is GGAS well positioned to make a unique contribution towards advancing the Strategic Initiative?
- Will it be relevant for at least one year and probably more?
- Will it be relevant across GGAS's various programs and not just one program?
- Would it drive funding for GGAS?
- Does it empower people?
- Will it enhance GGAS's efforts to become more diverse, equitable, and inclusive?
- Will GGAS be able to measure progress towards accomplishing the strategic initiative?
- Can any potential conflicts with GGAS's conservation advocacy priorities be managed?

Starting in November 2020, the board will make an annual determination whether to sunset a Strategic Initiative and/or to launch a second Strategic Initiative.

### **Mission Goals (broad, long-term outcomes that further the Mission)**

In pursuit of the Mission, taking into account the Theory of Change, Golden Gate Audubon will pursue five Mission Goals from January 2020 through June 2023.

Goal I (Engagement): Golden Gate Audubon will increase the number of people in the region who engage with the organization as readers, learners, participants, volunteers, members, and stewards.

Goal II (Wonder): Golden Gate Audubon will provide meaningful and impactful opportunities for children and adults to appreciate, learn about, and become inspired by birds.

Goal III (Action): Golden Gate Audubon will increase the number of people who take concrete actions, especially repeated actions, to protect native birds and the habitat they depend upon.

Goal IV (Advocacy): Governments, corporations, nonprofits, and individuals will increasingly make decisions that better protect native birds and their habitat as a result of Golden Gate Audubon's engagement and action.

Goal V (Healthy Bird Populations and Habitat): Native bird populations and their habitat will be more resilient and robust.

### **Institutional Goals (those in pursuit of a healthy organization)**

In addition to its Mission Goals, GGAS will also pursue three Institutional Goals from January 2020-June 2023.

Goal VI (Diversity, Equity, and Inclusion): Golden Gate Audubon's people and programs will be welcoming, inclusive, and equitable, and the organization's people (staff, volunteers, and those engaged under Goals I to IV) will increasingly reflect the racial, cultural, and economic diversity of the region.

Goal VII (Finances): Golden Gate Audubon will grow its revenue and manage its finances in order to make progress on its other Goals.

Goal VIII (Organizational Capacity): Golden Gate Audubon will have the human resources (staff, board, and volunteer), technology, and office needed to effectively fulfill its Goals.

### **Strategies in Pursuit of Mission Goals**

In pursuit of the Mission Goals, GGAS will focus on four major strategies (Youth Education, Adult Education, Conservation Advocacy, and Habitat Restoration), along with two cross-cutting strategies (Communications, Community Organizing).

### ***Major Strategies in Pursuit of the Mission***

### Strategy 1. Youth Education Program

*The Youth Education program primarily serves Goal II (Wonder), Goal III (Action), and Goal VI (Diversity, Equity, and Inclusion, by virtue of the schools currently served).*

For the 2019-2020 Fiscal Year, the Youth Education Program will remain focused on operating its existing educational program aimed elementary school students in Title 1 schools.

A new Eco-Education Committee will be charged with leading additional planning, funder research, and relationship-building with potential partners to determine whether and how to expand to:

- a) reach additional Title 1 elementary schools,
- b) reach junior high school or high school students (in the same districts where the current elementary school work is done), **or**
- c) have a greater impact via a “train the teachers” approach.

A newly formed Eco-Education Committee should make a recommendation by June 2020 , whether an expansion is feasible and, if so, for what. The decision should take into account the organization’s Theory of Change, looking at the number of potential children impacted, the potential connections to be made with their families and communities, and the persistence of any impact throughout their lives. The recommendation could involve moving forward with an investment in additional staff (*see Investment Potential 4*).

### Strategy 2. Adult Education Program

*The Adult Education program as currently run primarily serves Goal I (Engagement) and Goal II (Wonder).*

The Adult Education Program will continue to operate field trips, a speaker series, and classes.

The Adult Education Committee will be charged with implementing new tactics for the Program (starting no later than August 2020) to accomplish two priorities:

- Mobilize participants to take further actions via GGAS beyond the adult education realm (e.g. participating in conservation advocacy, habitat restoration, becoming members, etc.); and
- Mobilize a more diverse base of participants in order to further Goal VI (Diversity, Equity, and Inclusion).

Annually, the Adult Education Committee should review data from the last year on participants in order to inform planning for the subsequent year.

### Strategy 3. Conservation Advocacy Program



*The Conservation Advocacy program as currently run primarily serves Goal I (Engagement), Goal III (Action), Goal IV (Advocacy), and Goal V (Healthy Bird Populations and Habitat).*

The Conservation Advocacy Program will continue to be co-led by staff and the three Conservation Committees (San Francisco, East Bay, and Friends of the Alameda Wildlife Reserve), in order to influence decision-makers to take actions that will better protect priority native birds and priority habitat.

In addition to co-leading on conservation advocacy, the Committees also serve the board of directors as resources for information and analysis on important conservation issues.

Each of the three Committees will be charged with creating an Annual Plan (in September of each year) that identifies proactive priorities for the subsequent year. These plans will be reviewed by the staff and board. In setting these priorities, the Committees should apply the Conservation Advocacy Priority-Setting Criteria included as Appendix B. In particular, , the Committee should:

1. Avoid overextending themselves to ensure staff and volunteer time remains available to be reactive to unexpected developments;
2. Focus to the extent feasible on any Strategic Initiative selected by the Board;
3. Identify opportunities to work with Audubon California, other Audubon chapters, and other partners where advisable:
4. Identify opportunities to engage GGAS adult education leaders (field trip leaders, class instructors, speakers, etc.) so that they can better encourage participants to engage in GGAS conservation advocacy; and
5. Help advance GGAS's work promoting Goal VI (Diversity, Equity, and Inclusion);

Starting when staff focused on conservation advocacy is hired in Year 2 or 3 (See Investment #2 below), the priorities, tactics, and decision-making processes within this Strategy should be adjusted to reflect the additional staff capacity.

#### Strategy 4. Habitat Restoration Program

*The Habitat Restoration Program primarily serves Goal I (Engagement), Goal III (Action), and Goal V (Healthy Bird Populations and Habitat).*

The Habitat Restoration program will continue to be a staff-driven effort (led by the Director of Volunteer Programs) to recruit and use volunteers to accomplish habitat restoration in high priority locations in partnership with land management agencies. For the next three years, the program aims to sustain its current levels of habitat restoration and increase its participant engagement in restoration, with an eye towards identifying more future habitat restoration

opportunities that will help further Goal VI (Diversity, Equity, and Inclusion) by virtue of the geography targeted and the demographics of those who live or work nearby.

The Habitat Restoration program should also work to increase the proportion of its participants who take on engagement with GGAS **beyond** habitat restoration, particularly after GGAS succeeds in its Investments 2 (Conservation Director or Manager) and 3 (Community Organizer).

***Additional cross-cutting strategies that support the Mission Strategies and Goals***

In addition to the four major Programs identified above as individual Strategies 1-4, GGAS will pursue two other strategies (Communications and Community Organizing) that support all of the Mission Goals and Strategies 1-4.

Strategy 5. Communications

*GGAS Communications primarily serve Mission Goals I (Engagement), II (Wonder), III (Action), IV (Advocacy), as well as Institutional Goals VI (Diversity, Equity, and Inclusion) and VII (Finances).*

The Communications work of GGAS will continue to be staff-driven and encompass both online and offline communications, with the two-fold aim of (1) increasing the percentage of targeted audiences from diverse backgrounds in the GGAS territory who're familiar with and have positive feelings towards GGAS, and (2) enhancing participation in and the success of GGAS's other Programs and fundraising.

Staff will continue to create and implement an annual calendar of major communications activities, informed by data on past success. Staff will make annual recommendations (in advance of budgeting) with regards to potential investments to upgrade technology or tools, as well as any adjustments to strategy needed to further Goal VI (Diversity, Equity, and Inclusion).

Strategy 6. Community Organizing

Beyond the community organizing elements associated with GGGAS's adult education (Strategy 2), conservation advocacy (Strategy 3), and Habitat Restoration (Strategy 4), Golden Gate Audubon will also engage in community organizing in support of three additional programs: (A) the SF Bay Osprey Project (focused around the Osprey Cam), (B) Community Science, and (C) Docents.

#### A. SF Bay Osprey Project

Staff will continue to work with community members to plan for and implement the OspreyCam as a tool that advances GGAS's youth education, adult education, habitat restoration, conservation advocacy, fundraising, and communications Strategies, all as part of an overall San Francisco Bay Osprey Project.

During the 2019-2020 and 2020-2021 Fiscal Years, staff will prioritize tactics that more clearly identify outcomes of the OspreyCam that tie directly to the organization's other youth education, adult education, and communications. Each October, staff will prepare a short annual document for the Board reporting on the costs of and success from the Project, along with any proposed changes in tactics for the future.

#### B. Community Science

Staff will continue to work independently and in partnership with other organizations to develop and implement community science projects. These projects will serve as a tool to engage volunteers/members, to build the factual basis for GGAS's advocacy, and to reinforce our Adult Education program. Community science projects include:

- Projects done in conjunction with National Audubon, such as the Christmas Bird Count.
- Projects done with federal, state, and local agencies, related to GGAS habitat restoration sites and more broadly.
- Projects done to support Bay-wide bird surveys being coordinated by partner nonprofits.

#### C. Docents

Staff will continue to recruit and manage community members to serve as docents, with a focus on Burrowing Owls in Berkeley, Birding the Bay Trail, Lake Merritt's nesting birds, and community science projects. The docent programs serve as a vehicle to engage youth and adults, communicate with an audience of potential future GGAS supporters, and generate useful data for both GGAS and land managers.

Staff should place special emphasis on recruiting docents who are bilingual and/or match the demographics of those most likely to be using the natural areas in question.

During docent training, an emphasis will be made on training docents to engage with the public in a manner that: (1) increases the odds that those interacted with will choose to engage in some additional way with GGAS, and (2) increases the odds GGAS volunteers can interact most effectively with a more diverse audience than GGAS's current members and volunteers.

## **Institutional Goals and Strategies**

In pursuit of its Institutional Goals, GGAS will emphasize the following Strategies.

Unlike the Mission Strategies, which usually further several Goals at once, GGAS's Institutional Strategies are more clearly aligned with a single Goal, so Strategies are listed underneath the Goal in question.

### ***Goal VI (Diversity, Equity, and Inclusion) Strategies***

Strategy 7 (DEI Training and Planning). During Fiscal Year 2019-2020, GGAS's Executive Director and the Board DEI Committee will identify and engage the services of a consultant to:

- (1) train staff and volunteer leaders on the ways their privileges and implicit biases can serve as barriers to working with more diverse constituencies, and
- (2) develop a DEI action plan for the 2020-21 and 2021-22 fiscal years, including recommendations for any changes to this Strategic Plan to reflect what has been learned in the training.

Strategy 8 (Organizing diverse communities). Based on priorities established through the DEI Action Plan developed under Strategy 7 and independently by relevant committees, GGAS community organizing should prioritize engaging diverse communities who have not traditionally been engaged by GGAS. The Community Organizer position envisioned in Investment #3 (see below), projected to be hired at some point during the 2021-2022 Fiscal Year, should allow for a significant further boost in community organizing aimed at engaging diverse communities.

### ***Goal VII (Finances) Strategies***

Strategy 9 (Increased Development staff). During Fiscal Year 2019-2020, GGAS will increase by 0.5 FTE the amount of staff focused specifically on Development, via the creation of a new full-time Development Director position (who would take over most of the fundraising responsibilities of the current Development & Communications Manager).<sup>2</sup> (*See Investment 1 below*).

Strategy 10 (Major donors). GGAS will focus increased staff and board attention on cultivating relationships with and soliciting individual donations of \$1,000 and above.

Strategy 11 (Institutional donors). GGAS will maintain or increase the staff attention it can give to researching, relationship-building, and seeking grants from foundations and other institutions.

Strategy 12 (Membership fundraising). GGAS will maintain its customary cycle of member communications, appeals, and renewals in order to maintain its current level of members and

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<sup>2</sup> The specific list of shifted or new responsibilities will be identified during the creation of the Job Description.

revenue received from members as part of their annual giving, while widening the GGAS membership base to more closely match the demographics of the region.

Strategy 13 (Program generated revenue). GGAS will continue to work with volunteer teams to generate revenue from programs, including: (A) Birdathon, (B) the Travel Program, and (C) Adult education classes.

- A. Birdathon. GGAS will continue to operate a volunteer-led Birdathon in the spring of each year in order to raise unrestricted funds for GGAS.
- B. Travel. GGAS will seek to grow its current volunteer-led Travel Program in order to double the level of unrestricted revenue received via the program over the next 5 years.
- C. Classes. GGAS will continue to secure earned revenue via its Adult Education classes, with the intent of at least maintaining the current net level of earned income.

#### ***Goal VIII (Organizational Capacity) Strategies***

Strategy 14 (Staff). GGAS will further enhance its staff via ensuring excellent human resources practices, including:

- Hiring practices that secure a diverse applicant pool;
- Effective onboarding of new staff;
- Maintaining up-to-date job descriptions for all staff;
- Annual performance evaluations; and
- Professional development opportunities.

GGAS will also explore in Years 1 and 2 whether to launch an Internship program. Prior to a decision on an Internship program, individual staff may choose to work with the Executive Director to move forward with utilizing an intern for a program where they have lead responsibility, taking into account available staff time to oversee the intern, space limitations at the office, and the positive potential impact of the intern.

Strategy 15 (Board). GGAS will further enhance its Board by:

- Growing the board to fifteen active members by the end of the 2020-2021 fiscal year, with a focus on diversifying the board and increasing the board's fundraising capacity;
- Focusing the board's time on a combination of fundraising, planning and evaluation, ambassadorship, fiduciary duties, board recruitment, and additional training and planning related to Goal VI (diversity, equity, and inclusion); and

- Beginning to conduct an annual board self-evaluation, no later than December 2020.

Strategy 16 (Volunteers). GGAS will maintain and grow its large pool of volunteers by:

- Continuing to provide staff support via the Director of Volunteer Programs, supplemented starting at some point during the 2020-2021 Fiscal Year by conservation staff (*see investment 2 below*), and supplemented further in the 2021-22 Fiscal Year by the new Community Organizer position (*see Investment 3 below*).
- Increasing attention to thanking and otherwise recognizing all volunteers, groups, and volunteer leaders.

Strategy 17 (Technology). GGAS will maintain its current systems for tracking relationships with and communicating with its members, donors, volunteers, participants, and the public.

- Annually, the Executive Director should make recommendations as part of budgeting whether any upgrades to technology should be made in the upcoming year.

Strategy 18 (Office). During Year 1, GGAS will invest resources into upgrading the layout and usability of its current office so as to allow for the addition of the Development Director position and to prepare for additional staff and/or Interns in subsequent years. Further upgrades to the Office and/or an office move will be considered in Years 2-4 as resources are available with an aim towards ensuring the office is a welcoming and professional environment for volunteers, members, donors, and visitors.

## Investments

To further the above Strategies, GGAS plans to make an investment in additional development staff during the 2019-2020 Fiscal Year. The expectation is for the Development Director investment to boost future fundraising sufficiently so that the organization can move forward with additional investments in subsequent fiscal years.

The tentative order of priority for investments has been identified as:

- |                                     |   |
|-------------------------------------|---|
| 1. Development Director             | Year 1 2019-2020 Fiscal Year                                  |
| 2. Conservation Director or Manager | Year 2 2020-2021 Fiscal Year                                  |
| 3. Community Organizer              | Year 3 2021-2022 Fiscal Year                                  |
| 4. Youth Education                  | Year 2 or 3, 2020-2021 or 2021-2022 fiscal years <sup>3</sup> |

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<sup>3</sup> Under Strategy 1, further planning should take place through June 2020 to determine the best investment in additional youth education, which would place the earliest actual investment into the 2020-2021 FY given the necessary time required to secure grant funding. However, the organization may wish to consider an earlier investment for a specific project should a quick grant opportunity emerge while the youth education planning is taking place.

The investment is tagged to take place at some point **during** the year in question, not necessarily at the beginning of the year in question.

While GGAS expects to pay for Investments 1-3 via increased *unrestricted* revenue, the starting presumption is Investment 4 would more likely come from dedicated grants.

The decision to move forward with any of the above Investments shall be made annually during budgeting.

***Investment 1: Development Director***

The full-time Development Director would work on greater cultivation, stewardship, and solicitation of individual and institutional donors. The Development Director would work hand-in-hand with the Executive Director in leading implementation of Strategies 13 (Major Donors), 14 (Institutional Donors), and 15 (Membership). The Development Director would also work in concert with the Executive Director and Board Development Committee to bolster the board's role in assisting with major donor fundraising.

The expectation is that the additional fundraising generated by the Development Director would cover a majority of the cost of the position in the 2019-2020 Fiscal Year, and subsequently generate net revenue by their second year in the position.

***Investment 2: Conservation Director or Manager***

The Conservation Director or Manager would be a part or full-time position designed to work with the Conservation Committees and advocate for GGAS priorities with local governments, agencies, and decision-makers. The expectation is that once this position has been hired and trained, the Executive Director would be able to dramatically scale back time currently invested in conservation advocacy so as to focus more of the Executive Director's time on fundraising and organizational leadership.<sup>4</sup>

Following this Investment, GGAS should update its desired outcomes, roles, responsibilities, and processes within Strategy 3 to take advantage of the increased capacity.

Additional information about the potential role of the Conservation Director/Manager is included in Appendix D.

***Investment 3: Community Organizer***

The Community Organizer position would be a part or full-time position designed to advance GGAS's work with more diverse constituencies, while also working with the Director of Volunteer Programs to enhance the organization's capacity to move people from one form of engagement to others (e.g. the arrows from the Theory of Change). For example, the

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<sup>4</sup> Should the organization disengage from ongoing conservation advocacy related to Altamont, the Executive Director should be able to refocus considerable time on fundraising and organizational leadership even in the absence of Investment 2.

community organizer could work with the Adult Education Committee to magnify its efforts to mobilize those attending its classes, field trips, and speaker series to participate in habitat restoration and/or conservation advocacy.

#### ***Investment 4: Youth Education***

The specific desired Youth Education investment will be determined as part of the Youth Education planning described under Strategy 1. The potential investment could be some combination of staff and/or contractors.

### **Work Planning and Measuring Progress under the Strategic Plan**

#### *Work Planning*

Over the course of Year 1 and the first half of Year 2, staff and committees will develop Work Plans to identify at a more detailed level the major tasks needed to implement this Strategic Plan. Work Plans should specify who on the staff, board, or committee are the lead for each major task identified.

#### *Measurements of Success*

The Executive Director has overall responsibility for ensuring that the strategic plan is being implemented and progress is being measured, working with individual staff and committees as necessary to generate the benchmarks and data.

The following table represents a Dashboard containing the priority initial measurements of success identified as part of the creation of this Strategic Plan, covering a combination of Goals and Strategies.

No later than March 2020, all staff and committees will be tasked with reviewing this Dashboard and identifying any improvements required to their data collection methods. For example, the Adult Education Committee should identify what steps should be taken to better capture the names and contact information from those participating in walks.<sup>5</sup>

No later than April 2020, staff will report back to the board on its progress putting in place the tracking systems to implement the metrics identified above.

In many instances, the Dashboard indicates a timeline for when baseline data should be created and/or a specific numerical target identified. As such, this Dashboard is intended to be copied into a spreadsheet to be used on an ongoing basis.

In addition, further measurements of success related to DEI should be added to the Dashboard no later than October 2020 after implementation of Strategy 7 (training and planning to

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<sup>5</sup> The board should be aware that improvements in data collection may lead to an apparent improvement in participation, when in fact it was the data collection that improved. There is no obvious solution to this conundrum.



advance Goal VI (Diversity, Equity, and Inclusion)). These further measurements will be both specific to Goal VI and as sub-measurements of success within other specific strategies. For example, GGAS could choose to identify a DEI measurement of success for the demographic diversity of its field trip participants.

Starting in July 2020, the Executive Director will report semi-annually to the Board progress in implementing the Strategic Plan, including the Dashboard. It is recognized that while reporting will take place every 6 months, some of the metrics will be annual. The semi-annual report shall include any recommendations for changes to Strategies based on what has been learned or changed circumstances. At its discretion, the board may opt to have the Executive Director report more frequently on a few key metrics of organizational or financial health.

In addition, staff may choose to track additional metrics related to Goals and Strategies not identified within this dashboard to help implement the strategic plan and assess performance.

### ***The Dashboard***

Objective	Specific Numerical Target or Milestone
Goal I (Engagement) (Non-Digital): Increase the total number of people who engage with GGAS as measured by interactions captured in the Neon database <sup>6</sup> (covering participants, volunteers, members, donors, etc.).	Create benchmark data covering July 2018-June 2019 no later than June 2020.  Increase the total level of engagement by 30% for the 2022-2023 FY compared to 2018-2019 FY.
Goal I (Engagement) (Digital): Increase the total number of people engaging with GGAS online and the depth of the engagement, including unique website visits, email opens, social media followers and engagement, etc.).	Create benchmark data covering July 2018-June 2019 no later than June 2020.  Increase the total level of engagement by 30% for the 2022-2023 FY compared to 2018-2019 FY. <i>Note: further refinement of this metric should take place during Communications Work Planning.</i>
Goal III: (Action) - Planned: Use Neon to identify the number of people who've taken multiple actions as participants, volunteers, donors, etc. during FY 2018-2019; compare that to the number who do so in future fiscal years	Create benchmark data covering July 2018-June 2019 no later than June 2020.  Increase the total number of people who've taken multiple actions in a year by 25% by the end of 2022-2023 FY.

<sup>6</sup> Neon is the online database currently used by GGAS; there is no plan to change that during the next 3 years.

Objective	Specific Numerical Target or Milestone
<p>Goal IV (Advocacy): Create an annual document (probably in a spreadsheet format) cataloguing the efforts of GGAS Conservation Committees and staff to influence decision-makers (both proactive and reactive). For each, identify if the eventual outcome was a win, a loss, or neutral with regard to the decision-maker doing what was advocated by GGAS.</p>	<p>Create a document cataloguing 2019 efforts in January 2020, along with any lessons learned from the prior year.</p> <p>Use this to create a benchmark from which to evaluate future years and the organization's success.</p>
<p>Goal VI (Diversity, Equity, and Inclusion): Determine appropriate measurements of success during the training/planning that will take place during the 2019-2020 FY. (See <i>Strategy 7</i>)</p>	<p>To be determined following implementation of Strategy 7.</p>
<p>Goal VII (Finances): Grow the annual budget for the 2021-2022 Fiscal Year sufficient to make the specific Investments identified in the Strategic Plan.</p>	<p>By January 2020, determine a rough budget that would be required to cover existing staff (taking into account likely increases in pay), and the additional staff called for in the Investments. Make that the Objective for the 2022-2023 FY.</p>
<p>Strategy 1 (Youth Education)</p>	<p>No later than June 2020, identify specific measurements of success as utilized in grant requests/reporting for the youth education program.</p>
<p>Strategy 2 (Adult Education). Number of participants in classes and field trips. Number of attendees at the speaker series.</p>	<p>The number of participants/attendees in classes, field trips, and speaker series should at least stay even with past levels of participation.,</p>
<p>Strategy 4 (Habitat restoration).</p>	<p>No later than June 2020, the Director of Volunteer Programs should identify specific measurements of success based on invasive plants removed, native plants planted, volunteers engaged, etc. as part of grants for the habitat restoration program.</p> <p>To the extent some restoration projects do not have associated grants, develop proposed measurements of success in concert with the partner land management agencies.</p>
<p>Strategy 5 (Communications) - Reach</p> <p>Develop a set of metrics measuring GGAS's communications reach (the total # of people who receive emails, are part of social media, receive the Gull).</p>	<p>By June 2020, develop a benchmark measuring this for the 2018-2019 FY, along with a proposed Objective for the end of 2022-2023 FY.</p>

Objective	Specific Numerical Target or Milestone
<p>Strategy 5 (Communications) – Engagement</p> <p>Develop a set of metrics measuring the level of engagement created by GGAS communications, such as click through rates, social media engagement, etc.</p>	<p>By June 2020, develop a benchmark measuring this for the 2018-2019 FY, along with a proposed Objective for the end of 2022-2023 FY.</p>
<p>Strategy 10 (Major Donors)</p> <p>The newly hired Development Director will work with the Executive Director to draft a Development Plan by no later than 3 months after the completion of Investment 1 (Development Director hired). The Development Plan should include a measurement of success for growth in major donor fundraising comparing the 2018-2019 Fiscal Year to the 2022-2023 Fiscal Year.</p>	<p>To be determined based on the Development Plan. Targets should be included for the number of major donors, the total dollars given by major donors, and the average gift by major donors.</p>
<p>Strategy 11 (Institutional Donors)</p> <p>A proposed measurement of success for institutional fundraising should be created by the end of 2019 as part of the Development Plan (<i>See Strategy 11 for details</i>).</p>	<p>To be determined based on the Development Plan. Target should include the total dollars raised from foundations.</p>
<p>Strategy 12 (Membership)</p> <p>The number of GGAS members, defined as anyone who’s made a donation to GGAS in the last 12 months.</p> <p>The average amount donated by GGAS members during the past FY.</p>	<p>Benchmark to be established in June 2020 identifying the number of members as of 7/1/19.</p> <p>Membership level as of 7/1/23 to be at least as high.</p> <p>Excluding major donors, the average amount donated by members should increase by 8% between the 2018-2019 FY and the 2022-2023 FY.</p>
<p>Strategy 13A (Birdathon)</p> <p>The number of participants</p> <p>The total net dollars raised</p>	<p>Establish a benchmark by June 2020 for the number of spring 2019 birdathon participants and dollars raised (but backing out the benefit concert that is unlikely to be replicated).</p> <p>The success for participants and net dollars raised for 2023 should be at least as high.</p>

Objective	Specific Numerical Target or Milestone
<p>Strategy 15 (Board) – Members</p> <p>Number of active members as of the target of the end of the 2020-2021 FY.</p> <p>The board may choose to further increase the desired number of board members after the 2020-2021 FY.</p>	<p>15 board members by the end of the 2020-2021 Fiscal Year.</p>
<p>Strategy 16 (Volunteers)</p> <p>GGAS should more clearly define how it defines volunteers and should seek to increase the number of volunteers (assuming Investments for Conservation staff and community organizing are made)</p>	<p>No later than June 2020, set benchmark for number of volunteers used in 2018-2019 FY.</p> <p>The number of volunteers for the 2022-23 FY should be 25% higher.<sup>7</sup></p>

***Mid-Plan Evaluation and Update***

In the last quarter of 2021, staff will, with the potential involvement of an outside evaluator, generate a more comprehensive evaluation of whether implementation of the strategies is making at least the desired progress towards achievement of the Goals and Strategic Initiatives.

A board planning retreat should be considered to determine whether and how to make any significant adjustments to the Plan for its final two years in light of this Evaluation and changes to circumstances facing the organization, if any, that affect the Strategic Plan and its components.

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<sup>7</sup> This measurement of success assumes success in moving forward with Investment 3 (Community Organizer) no later than the final year of the Strategic Plan. .

## **Appendix A: Calendar of Specific Deadlines in the Plan (including Measurements of Success)**

*Note: Dates represent the deadline to complete an activity. In many instances, work towards completion will need to begin earlier. In other instances, the organization could choose to accelerate and complete actions prior to deadlines.*

*All actions requiring additional funding are contingent on sufficient funding being secured.*

### January 2020

- First annual catalogue of the past year's conservation advocacy success/lessons learned (See Dashboard, Goal IV Advocacy).
- Determine rough budget necessary to fully implement all the investments specifically called for in the Strategic Plan (See Dashboard Goal VII for details).

### February 2020

- Finalize selection of initial Strategic Initiative.

### March 2020

- Staff and Committees complete review of Dashboard and identify any adjustment in data practices needed. (See Measuring Progress).

### April 2020

- Staff report to Board progress on putting in place upgraded data systems needed to Measure Progress for the Dashboard.

### June 2020

- Youth Education Committee makes recommendations (See Strategy 1).
- Complete DEI Training and Action Plan, including necessary updates to the Strategic Plan (See Strategy 7).
- Full-time Development Director on staff (See Strategy 9) (*Note: highly desirable that this takes place earlier in the fiscal year*).
- Annual decision on technology upgrades as part of budgeting (See Strategy 17).
- Create benchmark data and additional measurements of success for a variety of the specific measurements called for in the Dashboard (See Dashboard for details).

### July 2020

- First semi-annual report from staff to board on Dashboard.

August 2020

- Adult Education Committee implements new tactics (See Strategy 2).

September 2020

- Conservation Committees complete first annual plans (See Strategy 3).
- Development Plan completed (See Dashboard Strategy 10 for details). *Note: actual deadline is 3 months following hiring of Development Director.*

October 2020

- Annual report on OspreyCam successes/costs and recommendations (See Strategy 6A).
- Dashboard updated to reflect DEI training and action plan.

November 2020

- Decision whether to sunset the first and/or add a second Strategic Initiative.

December 2020

- First annual board self-evaluation completed (See Strategy 15) (timing of subsequent self-evaluations TBD based on when first one is conducted).
- All staff and Committees will develop Work Plans that reflect any shifts needed to fully implement the strategic plan (See Work Planning).

January 2021

- Second semi-annual report from staff to board on Dashboard.
- Second annual catalogue of the past year's conservation advocacy success/lessons learned (See Dashboard, Goal IV Advocacy).

June 2021

- Decision whether to launch an Internship program (See Strategy 14).
- Board achieves target of 15 active board members (See Strategy 15).
- Annual decision on technology upgrades as part of budgeting (See Strategy 17).
- Conservation Director or Manager hired (See Investment 2).

July 2021

- Third semi-annual report from staff to board on Dashboard.

September 2021

- Conservation Committees create new annual plans (See Strategy 3).

October 2021

- Annual report on OspreyCam successes/costs and recommendations (See Strategy 6A).

November 2021

- Decision on any adjustment to the list of Strategic Initiatives.

January 2022

- Fourth semi-annual report from staff to board on Dashboard, including more comprehensive assessment.
- Third annual catalogue of the past year's conservation advocacy success/lessons learned (See Dashboard, Goal IV Advocacy).

February-March 2022

- If appropriate, Planning Retreat to determine if any major shifts to the plan should be considered for the final 16 months.

June 2022

- Annual decision on technology upgrades as part of budgeting (See Strategy 17).
- Community Organizer hired (See Investment 3).
- Additional Youth Education staff/contractor, if recommended (See Investment 4).

July 2022

- Fifth semi-annual report from staff to board on Dashboard.

September 2022

- Conservation Committees create new annual plans (See Strategy 3)

October 2022

- Annual report on OspreyCam successes/costs and recommendations (See Strategy 6A).

November 2022

- Decision on any adjustment to the list of Strategic Initiatives

January 2023

- Sixth semi-annual report from staff to board on Dashboard.

July 2023

- Final report on the Dashboard, potentially as part of generating a new 2023-2026 Strategic Plan.

## **Appendix B: Conservation Advocacy Priority Setting Criteria**

These criteria should be initially applied annually by each Conservation Committee to identify its proactive priorities and by staff to identify what work staff will prioritize above and beyond the work of the Committees.

They should further be applied by each Committee and staff when determining whether or not to react to a threat or new opportunity.

### ***Proactive work***

These criteria are intended to annually help identify what proactive work should be done by the Conservation Committees and/or staff above and beyond the work of the Committees.

In answering the questions posed by the criteria, staff and volunteers should consider reasonable time horizons and the geographic scale of the work.

1. Can the mix of issues be addressed without overextending staff, volunteers, or finances to ensure time and money remains available to be reactive to unexpected developments;
2. Are at least some of the issues related to a Strategic Initiative selected by the Board;
3. Does the proposed issue work provide opportunities to engage GGAS adult education leaders (field trip leaders, speakers, etc.) so as to better integrate GGAS conservation advocacy into the adult education program; and
4. Does addressing the issues or protecting the locations potentially help us advance Goal VI (being more diverse/equitable/inclusive)?
5. Are we addressing the issues that will most effectively protect at-risk native bird populations and their habitat?
6. Do the issues or locations offer an opportunity to build a stronger alliance with California Audubon, other regional Audubon chapters, and/or other long-term nonprofit partners?
7. Are the issues and locations ones where GGAS can be most effective given our skills/capacity?
8. Are the issues or locations clearly tied to our mission of engaging people, including our volunteers/members and the general public?
9. What would the potential public relations value be from working on the issue or protecting the location, either positive or negative?
10. Do we have the capacity to communicate about the issue and/or location being protected?



***Reactive work***

When any of the Conservation Committees or staff are faced with potential reactive work, they should ask the same questions as identified for proactive work before deciding to take it on, with the following additional questions:

1. If non-trivial staff time is required to do the reactive work, are there staff activities that can be given up or delegated to volunteers so as to free up the needed staff time for the reactive conservation advocacy?
2. Can GGAS defer to other groups to instead lead on the reactive work, with GGAS either staying out or playing a very minor role?
3. Is it an issue or location of high member interest?

### Appendix C: Theory of Change – Complete Version

GGAS theory of change aims to explain how the organization’s principle Goals and activities advance achievement of the Mission.

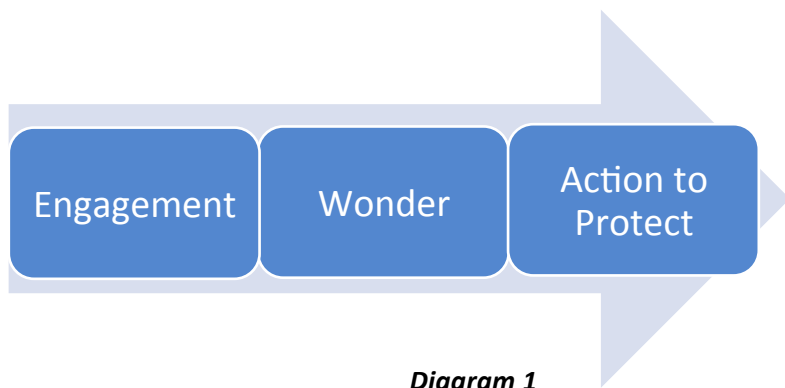
The mission necessarily implies three steps:

Step 1 – People are engaged.

Step 2 – People experience the wonder of birds

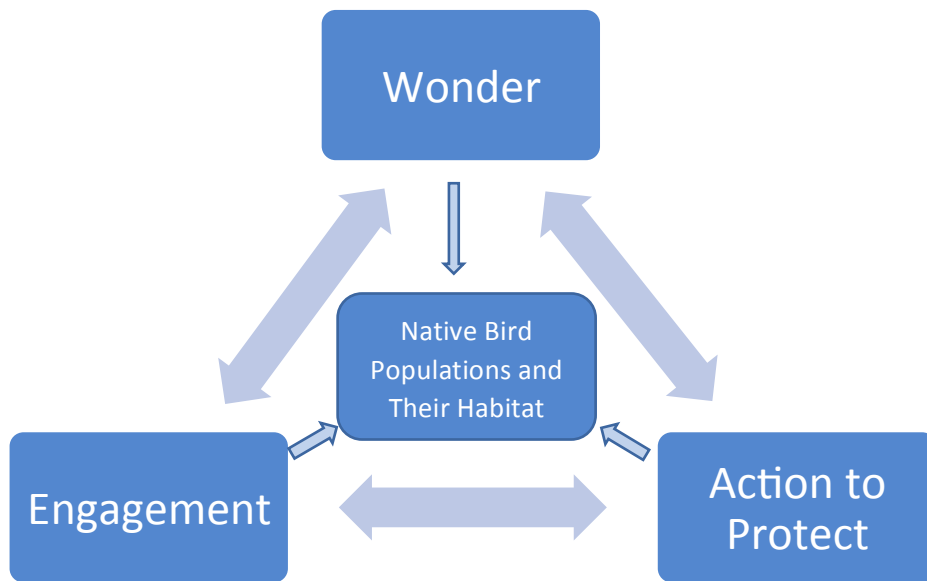
Step 3 – People translate that wonder into action to protect.

The following Diagram 1 represents this process in its simplest form.



**Diagram 1**

However, the process of moving from engagement to wonder and action isn’t always linear, suggesting a somewhat more complex Diagram 2:

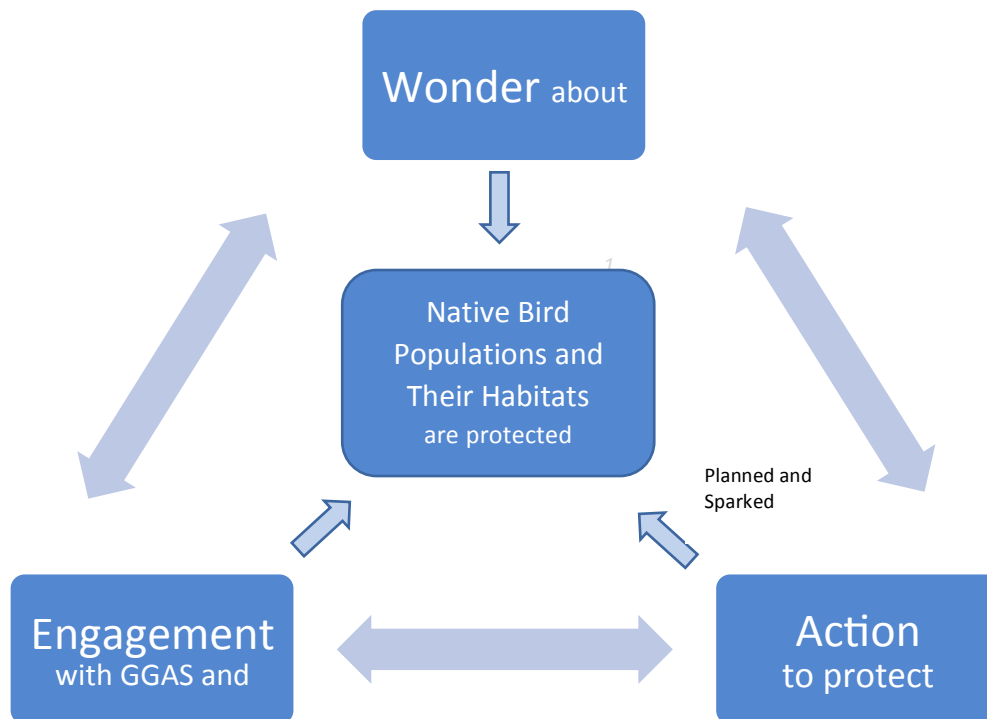


**Diagram 2**

**Planned Actions:** Some “actions to protect” native bird populations and their habitat are **planned**, in that GGAS is working on them and the actions taken by individuals are those GGAS directly requests they take. For example, a field trip participant may sign up to participate in a habitat restoration event that GGAS is sponsoring in the following month.

**Sparked actions:** Other “actions to protect” native bird populations and their habitat have nothing to do with anything GGAS planned, and simply occur as a result of the **spark** created by the **engagement** and sense of **wonder** brought about by GGAS programs. For example, a field trip participant may subsequently choose to speak out on a national bird conservation issue that GGAS does not address.

Therefore, a more complete version of the Theory of Change is shown in Diagram 3.



**Diagram 3**

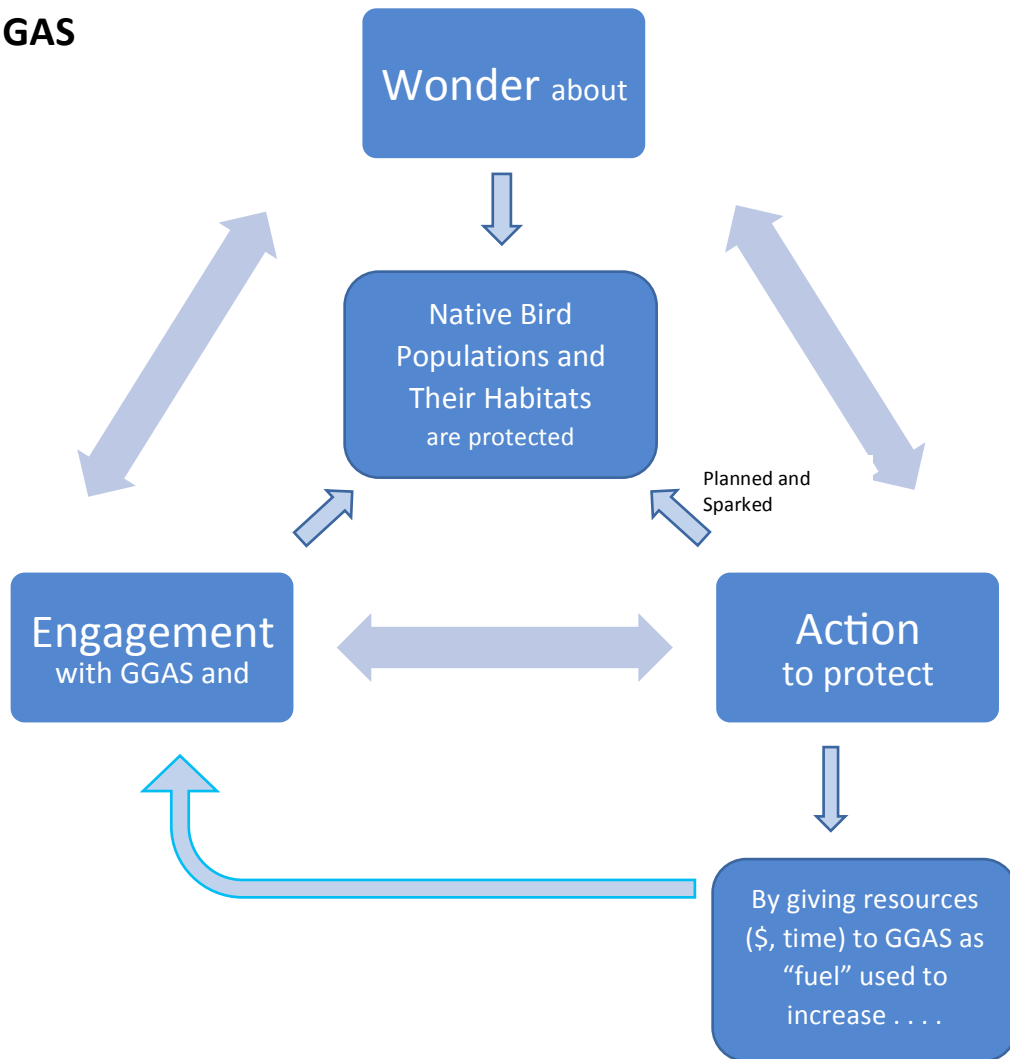
Lastly, some “actions to protect” are about enhancing the *capacity* of GGAS. People take action in part by donating, serving on a committee, participating in Birdathon, etc., all of which provide GGAS resources to subsequently increase the numbers of people engaged in future months and years.

Thus, the most complex version would be Diagram 4.

**Without GGAS**

Threatened Native  
Bird Populations and  
Habitats

**With GGAS**



**Diagram 4**

***Implications of the Theory of Change***

A few implications of the Theory of Change are reflected in the remainder of this Strategic Plan and should be taken into account when developing more specific work plans for staff and committees.

1. All GGAS activities should: (1) be clearly aimed within one or more of the boxes or (2) serve as one of the arrows, moving people from one box to another.
2. While GGAS already moves a large number of people between the boxes, it is almost certainly missing opportunities to move people through the process. Over the next 3-4 years, GGAS should become more intentional and efficient about this process.
3. In order to be more intentional, GGAS needs to generate data and/or use data from other organizations to determine over time which activities are most effective at moving people to deeper engagement, more wonder, and more action, both direct and indirect.

**Appendix D: Additional background on the potential Conservation Director/Manager role**

*Investment 2 (Conservation Director or Manager)* calls for the creation of a Conservation Director or Manager position that would be part or full-time and would work with the Conservation Committees and advocate for GGAS priorities with local governments, agencies, and decision-makers.

Completion of this Investment, including training time, would allow the Executive Director position to scale back dramatically the current time commitment towards conservation advocacy so as to focus more of the Executive Director's time on fundraising and organizational leadership.

A complete job description should be created for the Conservation Director or Manager position prior to a final decision to make the hire is made as part of annual budgeting.

Following this Investment, GGAS should update its desired outcomes, roles, responsibilities, and processes within Strategy 3 to take advantage of the increased capacity.

Examples of activities potentially led by the Conservation Director or Manager include:

- Raising conservation awareness to our board, staff, and membership.
- Developing white papers or other research on potential impacts to birds and wildlife from proposed developments and, where appropriate, submit comments, testify at public hearings, etc. and/or recruit volunteers to do so.
- Directly engage with and recruit volunteers to engage with planners and other local officials/staff about procedural requirements, such as biological surveys, assessments, avoidance measures, etc.
- Work directly with the Conservation Committees to track projects, comment within deadlines, etc.

Further adjustments to the Conservation Director/Manager role would be expected after Investment 3 (Community Organizer) is also completed.