

Golden Gate Audubon Society - Strategic Plan

July 2022-June 2025



Adopted on December 27, 2022

Board of Directors

Eric Schroeder, President

Christina Tarr, Vice President

Christine Okon, Secretary

Derek Heins, Treasurer

Jess Beebe

Amy Chong

Ilana deBare

Blake Edgar

Brandy Ford

Angie Geiger

Rachel Lawrence

Bruce Mast

Susan MacWhorter

Sharol Nelson-Embry

Solana Rice

Dan Roth

Executive Summary

This July 2022-June 2025 Strategic Plan represents an update to the January 2020-June 2023 Plan that was adopted in November 2019.

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 the best effort to identify the combination of Goals and Strategies to take the organization to the next level of effectiveness.

A few highlights of the Updated Strategic Plan:

- GGAS will pay 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.
- GGAS increasingly recognizes the importance of climate change as a topic that the organization should address in multiple ways.
- GGAS will improve its systems for collecting and using data 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.
- GGAS will continue to increase its 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.
- GGAS will continue to invest in staff as sufficient funds are raised to do so with confidence the increased fundraising is sustainable.

This plan contains the following sections:

- Timeline and Terminology
- Vision and Mission
- Theory of Change
- Strategic Initiatives
- Goals
- Strategies
- Work Planning, Measurements of Success, and Plan Updates
- Appendix A: Conservation Advocacy Priority-Setting Criteria

Timeline and Terminology

Timeline

This strategic plan runs from July 2022-June 2025, a period of 3 years.

Year 1 is the July 2022-June 2023 Fiscal Year

Year 2 refers to the 2023-2024 Fiscal Year.

Year 3 refers to the 2024-2025 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

Vision – A short statement describing the ideal world the organization is working towards.

Mission – A short statement identifying the unique role of the organization in pursuit of the Vision.

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

Strategic initiatives – coordinated action to advance several different individual 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 regard to their public policy, business practices, and/or behavior whether government, corporate, nonprofit, consumers, landowners, voters, or recreationists.

Region – the word "region" refers to the nine-county Bay Area with an emphasis on the specific territory that GGAS covers based on its agreement with the National Audubon Society and its sister Audubon chapters.

Vision

A world where birds, wildlife, and all people flourish together.

Mission

Shorter alternative: To inspire people to protect Bay Area birds and our shared natural environment.

About Us

For more than 100 years, Golden Gate Audubon has played a critical role in preserving Bay Area habitats for the rich diversity of birds that live here year-round and those that overwinter, rest, and feed during migration.

We restore habitats, advocate to conserve wildlife areas and involve Bay Area residents in protecting our local birds. Our educational programs reach thousands each year, including children, adults, and families.

Golden Gate Audubon recognizes the interconnection between birds and people and seeks to protect all of our interests together. We strive to create an equitable and inclusive environment for people too often excluded from full participation in birding and conservation organizations, including Black, Indigenous, and other people of color; families and individuals with low income; LGBTQIA+ people; and people with disabilities.

Theory of Change

GGAS's theory of change aims to explain how the organization's principal Goals and activities advance the Mission.

The mission implies three steps:

1. People are inspired
2. People take action
3. The actions result in the protection of birds, wildlife, and the natural environment on which we all depend.

GGAS's work presumes that:

- Inspiration can and should happen at any age. Therefore, GGAS has developed programs aimed at educating both youth and adults.

- There is no one setting or method that will inspire everyone. Therefore, GGAS has developed programs that educate people at home, in person at lectures, and other settings designed for learning, and outside while directly experiencing birds and the natural world.
- Inspiration can lead people to action. Therefore, GGAS provides Bay Area community members with concrete actions to take, such as participating in a hands-on habitat restoration project, speaking up as an advocate with elected officials and public policymakers, and participating in community science projects such as the Christmas Bird Counts.
- Some actions are best taken collectively. Therefore, in addition to sparking individual action, GGAS strives to build a strong and enduring organization that can advocate on behalf of its membership via lawsuits, formal comments, and staff-led advocacy. In doing so, GGAS enables its volunteers and members to protect Bay Area birds, wildlife, and people in ways that individuals could not accomplish working on their own.
- The actions that GGAS promotes to protect birds and wildlife are intrinsically connected to promoting safe and healthy Bay Area human communities. Therefore, GGAS's outreach, education, and conservation advocacy must be equitable, inclusive, and connected to broader efforts to protect those most at risk from pollution, habitat loss, climate change, and other forms of environmental injustice.

Strategic Initiatives

During the course of the Strategic Plan, Golden Gate Audubon will pursue three Strategic Initiatives.

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

Communications: GGAS communications staff will place special emphasis on the Strategic Initiatives within GGAS communications.

The Three Strategic Initiatives are

1. Birding for Everyone
2. Climate change
3. Richmond

Starting in November 2023, the board will make an annual determination on whether to sunset a Strategic Initiative.

Strategic Initiative 1: Birding for Everyone

This initiative aims to increase the diversity, inclusivity, and equity in Golden Gate Audubon's membership, leadership, and programs.

Beginning in 2022, the Diversity Committee will develop a DEI Action Plan for Board approval in Fall 2022. Other Committees and staff will be asked to incorporate into their own work relevant items from the DEI Action Plan, as well as additional tasks they develop that further the overall DEI objectives. This Plan should include identifying any ongoing training needs for the staff, board, and key volunteers. The DEI Committee and staff will report back quarterly to the board on progress.

Strategic Initiative 2: Climate Change

This initiative aims to engage Golden Gate Audubon in effectively fighting the greatest single threat to birds and our environment.

During the second half of 2022, a Climate Committee will develop and begin implementing a concrete plan for how GGAS can more effectively incorporate activities and outcomes that address the causes and consequences of climate change with regard to birds and human communities. The Committee will establish monitoring protocols for tracking GGAS carbon emissions across all programs. The Committee will interface with other relevant Committees in order to inform the planning and implementation. The Committee's recommendations will be implemented dependent on funding. The GGAS board will revisit this Strategic Initiative in late 2022 or early 2023 to determine if (a) it should be continued and/or (b) turned into an ongoing GGAS "Climate Change Program," or (c) phased out.

Strategic Initiative 3: Richmond:

This initiative aims to support the people and wildlife of Richmond, a community that has historically been underserved both economically and environmentally.

During the three years of the Strategic Plan, a GGAS Richmond Committee will develop specific plans for how GGAS programs can more effectively engage the public in the city of Richmond and its surrounding communities. The Richmond Committee will interface with all other relevant committees at least annually to discuss what can be done in the upcoming year. The Committee's recommendations will be implemented dependent on funding. The Richmond Committee will also report back semi-annually to the board on progress being made.

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 four Mission Goals from July 2022 through June 2025.

Goal I (Inspiration): Golden Gate Audubon will increase the number of people in the region who it inspires by engaging them as learners, participants, volunteers, members, and stewards.

Goal II (Action): Golden Gate Audubon will increase the number of people who take concrete actions, especially repeated actions, to protect native birds and our shared natural environment.

Goal III (Advocacy): Golden Gate Audubon will successfully spur local governments, corporations, and nonprofits to make decisions that better protect native birds and our shared natural environment.

Goal IV (Healthy Bird Populations and Habitat): Native bird populations and their habitats 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 July 2022-June 2025.

Goal V (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 by the organization's work) will increasingly reflect the racial, cultural, and economic diversity of the region.

Goal VI (Finances): Golden Gate Audubon will grow its revenue and manage its finances in order to make progress towards achievement of its other Goals.

Goal VII (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

By introducing low-income youth to nature, we are helping create a new and diverse generation of advocates for birds and wildlife and deepening their engagement with the natural world.

For the 2022-2023 Fiscal Year, the Youth Education Program will be focused on reestablishing in a post-COVID environment its basic educational program aimed at K-6 (elementary) school students in Title 1 schools.

While this work is underway, the Youth 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, and/or
- b) reach Middle School or High School students (in the same districts where the current elementary school work is done).
- c) explore opportunities for continued engagement outside the classroom (e.g., summer programs, weekend outings for students and their families,...)

The Youth Education Committee should make recommendations by December 2022 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, should funding be identified.

Strategy 2: Adult Education Program

Our educational programs introduce people to the wonder of birds and provide them with the knowledge and inspiration to become conservation advocates.

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

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

Annually as part of Work Planning, the Adult Education Committee should create a work plan that accomplishes the following 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.);
- Mobilize a more diverse base of participants in order to further Goal VI (Diversity, Equity, and Inclusion) and the Birding for Everyone Strategic Initiative.
- Offer a range of adult education activities focused on Richmond as part of the Richmond Strategic Initiative.
- Incorporate the topic of climate change as part of the Climate Change Strategic Initiative.

The Annual Work Plan should strive to improve from year-to-year budget planning, pricing, and income and expense forecasting (see Strategy 13).

Strategy 3: Conservation Advocacy Program

Our conservation program mobilizes the Audubon community and allies to make their voices heard on behalf of wildlife and the environment.

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. *(The East Bay Committee should coordinate with the Richmond Committee to determine who will lead on any conservation advocacy aimed at the City of Richmond).*

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

Each of the three Conservation Committees will be charged with creating an Annual Plan (in September of each year) that identifies proactive priorities for the subsequent year and examples of concrete steps that members can take in support of at least some of those priorities. These plans will be reviewed by the staff and shared with the board. In setting priorities, the Committees should apply the Conservation Advocacy Priority-Setting Criteria included as Appendix A. 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 the Climate Change and Birding for Everyone Strategic Initiatives;
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.

Starting when staff focused on conservation advocacy is hired (hopefully no later than during Year 2), the priorities, tactics, and decision-making processes within this Strategy should be adjusted to reflect the additional staff capacity.

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 and the greater community, to build the factual basis for GGAS's advocacy, and to reinforce the Adult Education program. Community science projects include:

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

Strategy 4: Habitat Restoration Program

By restoring Bay Area habitat, we contribute to the resilience of local and migrant bird species and deepen volunteers' engagement with the natural world.

The Habitat Restoration program will continue to be a staff-driven effort (led by the Manager 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 (a) the Richmond Strategic Initiative, and/or (b) 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 hoped-for investment in conservation advocacy/community organizing staff.

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.

Strategy 5: Communications

Communications bridges the various parts of the GGAS community, publicizing opportunities for learning, volunteerism, and advocacy and inspiring constituents to become more involved.

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 who're familiar with and have positive feelings towards GGAS, and (2) enhancing participation in and the success of GGAS's 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 annual 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

Our community organizing work provides opportunities for people both within and outside Golden Gate Audubon to engage with birds and take on meaningful volunteer roles as leaders, community scientists, and educators.

After GGAS is able to move forward with hiring conservation advocacy/community organizing staff, GGAS should develop a more specific plan and set of tactics for engaging its members and the general public in its activities, including Adult Education (Strategy 2), Conservation Advocacy (Strategy 3), and Habitat Restoration (Strategy 4). The audiences for these efforts should reflect Strategic Initiative 1 (Birding for Everyone).

Before GGAS is able to hire new staff, GGAS will engage community members in a more ad hoc way around specific projects, including: (A) the SF Bay Osprey Project (focused around the Osprey Cam), (B) Community Science, (C) Docents, and (D) ad hoc organizing in Richmond as part of Strategic Initiative 3 (Richmond) and via its Conservation Committees (Conservation Advocacy, Strategy 3).

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.

During Year 1, staff will work with the OspreyCam Committee to identify outcomes of the OspreyCam that tie directly to GGAS's Youth Education program, and Adult Education program. Staff will also determine how to better highlight the OspreyCam in service to its Communications goals. Each October, staff will prepare a short annual document for the Board reporting on the costs of and success from the SF Bay Osprey 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 and the greater community, to build the factual basis for GGAS's advocacy, and to reinforce the Adult Education program. Community science projects include:

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

C. Docents

Staff will evaluate and pilot new initiatives to re-invigorate the docent program with an emphasis on Community Science and conservation priorities identified by the conservation committees (eg. Plants for Birds) or strategic initiatives. 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 and Committee members 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 effectively with a more diverse audience than GGAS's current members and volunteers.

D. Richmond and Conservation Committees

The Richmond Committee established under Strategic Initiative 3 will incorporate in its planning and activities opportunities to engage and organize the local community in the Richmond area. The Conservation Committees as part of Conservation Advocacy (Strategy 3) should also identify opportunities for GGAS members and community members to take action on behalf of their priorities.

Institutional Goals and Strategies

Strategy 7: Fundraising

Robust fundraising strategies will provide the resources for us to implement the goals of this Strategic Plan.

A. Major Donors

GGAS will focus increased staff and board attention on cultivating relationships with and soliciting individual donations of \$1,000 and above.

B. 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.

C. Membership Fundraising

GGAS will strengthen its cycle of member communications, appeals, and renewals in order to modestly grow its level of members and 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.

D. Corporate fundraising

GGAS will assess the potential for securing significant corporate sponsorships and/or donations for specific programs or for the organization as a whole. Staff will report back the initial results of this assessment by the end of the 1st quarter of 2023. Consider adopting a Gift Acceptance Policy if/when corporate fundraising becomes a significant activity.

Strategy 8: Program generated revenue

Earned revenue provides funding to maintain our operations while providing programs that deepen participants' knowledge and commitment to bird conservation.

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. Classes. GGAS will continue to secure earned revenue via its Adult Education classes, with the intent of increasing the current net level of earned income.
- C. 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.

Strategy 9: Staff

Staff members are key to coordinating and leveraging the work of our many volunteers: A diverse and well-managed staff will ensure that we have a broad and effective reach.

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 evaluation and ongoing dialogue with staff regarding job performances; and
- Professional development/training opportunities.

New staff position: No later than during Year 2, GGAS hopes to hire a full-time staff person who would play the lead role in staffing the organization's Conservation Advocacy (Strategy 3) and community organizing (Strategy 6) work. In addition to expanding GGAS capacity, the expectation is that once this position has been filled, the Executive Director would be able to significantly scale back time currently invested in conservation advocacy and community engagement so as to focus more of the Executive Director's time on fundraising and organizational leadership.

Beyond this conservation advocacy/community organizer position, decisions about additional staff will be made annually as part of budgeting.

GGAS will also explore in Year 1 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 10: Board

A strong, skilled, and diverse Board is necessary for GGAS to meet its strategic goals and represent our broad Bay Area community.

GGAS will further enhance its Board by:

- Growing the board to 20 active members, with future board recruitment focused on demographically 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 the organization's Strategic Initiatives; and
- Conduct and improve annual board self-evaluations.

Strategy 11: Volunteers

Volunteers are the heart of Golden Gate Audubon and essential in achieving our strategic goals.

GGAS will maintain and grow its large pool of volunteers by:

- Continuing to provide staff support via the Manager of Volunteer Programs, supplemented at some point during Year 2 by conservation advocacy/community organizing staff (*see Strategy 10: Staff*).
- Increasing attention to thanking and recognizing all volunteers, groups, and volunteer leaders.

Strategy 12: Technology and Internal Communications

Technology is important in tracking metrics for this Strategic Plan, sharing information across the organization, and facilitating collaboration between staff and volunteers.

During Year 1, GGAS will identify and begin making investments and changes as necessary to (1) more effectively track relationships with and communications with its members, donors, volunteers, participants, and the public, and (2) share information across committees and programs so as to break down silos.

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

Strategy 13: Office

Welcoming and professional office space is important for staff productivity and volunteer engagement.

During Year 1, GGAS will explore options for new office space with an aim towards ensuring the office is a welcoming and professional environment for staff, volunteers, members, donors, and visitors. GGAS will prioritize locations that are accessible via BART and local transit. GGAS will explore the possibility of including training and learning spaces in the office.

Work Planning and Measuring Progress under the Strategic Plan

Work Planning

All staff and Committee Chairs are expected to review this Strategic Plan and identify any adjustments needed to work plans and work planning in order to implement the Strategic Plan.

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 the Deputy Director and 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 January 2023, all staff and Committee Chairs 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.¹

No later than April 2023, staff will report back to the board on its progress putting in place the tracking systems to implement the Dashboard metrics.

In many instances, the Dashboard indicates a timeline for when baseline data should be created and/or a specific numerical target identified.

In addition, further measurements of success related to DEI should be added to the Dashboard after the completion of the DEI Action Plan (under Strategy 7). 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 2023, the Executive Director will report progress to the Board in implementing the Strategic Plan, including the Dashboard at every full meeting of the board. It is recognized that while reporting will take place every 6 months, some of the metrics are 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.

¹ 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.

The Dashboard

[Click here to see the full Spreadsheet with details behind the Dashboard](#)

The Dashboard July 2022-June 2025		
Objective	Revised Plan: Specific Numerical Target or Milestone	Tracking
<p>Goal I (Inspiration) and Strategy 5 (Communications): Increase the total number of people who engage with GGAS as measured by interactions captured in the Neon database, social media, print media, and other digital platforms.</p>	<p>Increase the level of engagement across designated metrics by 10% each year through the 2024-2025 FY.</p> <p>Benchmark: June 2022</p>	<p><u>Engagement & Communications Tab</u></p>
<p>Goal II: (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</p>	<p>Increase the number of people who participate in more than one action by 15% for the 2024-2025 FY compared to 2022-2023.</p> <p>This analysis is only possible once we have our unpaid event registrations (volunteer events and field trips) processed through our Neon database as opposed to Wordpress or partner platforms.</p> <p>First Step: Transition unpaid event registration to Neon by the start of Q2, create benchmarks from Q2-Q4 data.</p>	<p>To begin when the first step is met</p>

<p>Goal III (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>First Step: Meet with the Conservation Committee Chairs in Q1 2022-2023 to:</p> <ul style="list-style-type: none"> • Determine measurable goals • Create a standardized document for cataloging each committees efforts, and goal tracking • Discuss UJoin tool and measurable goals for its success <p>Second Step: Outline conservation goals for the organization outside of the conservation committees.</p>	<p>To begin when the first step is met</p>
<p>Goal V (Diversity, Equity, and Inclusion): Determine appropriate measurements of success during the training/planning that will take place during the 2019-2020 FY. (See Strategy 7)</p>	<p>Increase the diversity of our leaders who deliver programs (staff, field trip leaders, board, and class instructors) each year. Better understand our membership demographics for future work.</p> <p>Increase the number of Adult Ed students receiving scholarship funds to 15 students by the end of the 2024-2025 FY</p> <p>Benchmark: The July 2022 composition of leaders. Survey to be sent to class instructors, field trip leaders, board, and a sample of members.</p> <p>Tracked annually</p>	<p>DEI Tab</p>
<p>Goal VI (Finances): Grow the annual budget for the 2021-2022 Fiscal Year sufficient to make the specific Investments identified in the Strategic Plan.</p>	<p>Grow the annual budget sufficient to add a Conservation/Community Outreach position in 2023-2024, and Development Director and additional entry level Conservation/Community Outreach staff by 2024-2025.</p>	<p>Finances Tab</p>

<p>Strategy 1 (Youth Education)</p>	<p>Increase the percentage of grant revenue to program costs to 80% by the 2024-2025 school year, while maintaining the current volume of programming</p> <p>Benchmark: 2021-2022 school year.</p> <p>Measured Quarterly.</p>	<p>Youth Ed Tab</p>
<p>Strategy 2 (Adult Education). Number of participants in classes and field trips. Number of attendees at the speaker series.</p>	<p>Maintain or increase the level of classes and field trips.</p> <p>Increase the number of attendees at speaker series events by 10% by FY 2024-2025.</p> <p>Increase the net revenue of the Travel with GGAS program to \$50,000/year.</p> <p>Increase the net revenue of classes to cover all direct and indirect costs with some additional revenue to support other mission activities. Benchmark data will be created using improved tracking in FY 2022-2023</p> <p>Explore metrics for quality and impact of programs.</p>	<p>Adult Education Tab</p>
<p>Strategy 4 (Habitat restoration) and Strategy 11 (Volunteer engagement)</p>	<p>By FY 2024-2025: Increase the number of volunteer events by 5%, the number of volunteer participants by 15%, the volume of invasives removed by 10%.</p> <p>Increase the amount of grant revenue to program expenses to 80%.</p> <p>Increase the docent program by expanding into at least 2 new locations.</p> <p>Metrics tracked Quarterly.</p> <p>Benchmark created with FY 2022-2023 Q1 data.</p>	<p>Habitat Restor. & Volunteers Tab</p>

<p>Fundraising: Strategy 10 (Major Donors), Strategy 11 (Institutional Donors), and Strategy 12 (Membership)</p>	<p>Increase the number of Members to 5,000 by FY 2024-2025. Increase the retention rate of members to 80% by FY 2024-2025. Increase total Membership income to \$170,000 by FY 2024-2025.</p> <p>Increase the number of corporate donors to 15, generating \$75,000 by FY 2024-2025.</p> <p>Increase the number of each donor type by FY 2024-2025: individual donors to \$500,000, foundational donors to \$150,000, and government agencies to \$150,000.</p>	<p>Memberships & Donations Tab</p>
<p>Strategy 10 (Board) – Members</p>	<p>Increase the number of board members to 18 by the end of the 2022-2023 FY and 20 by 2024-2025 FY.</p> <p>Increase diversity of board members in terms of community representation and skills.</p>	<p>Board Roster Tab</p>

Mid-Plan Evaluation and Update

In the last quarter of 2023, 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 18 months in light of this Evaluation and changes to circumstances facing the organization, if any, that affect the Strategic Plan and its components.

Appendix A: 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, as well as any projected conservation advocacy work by staff above and beyond the Committees' work.

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) and/or Strategic Initiative 3 (Richmond)?
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?