

St. Louis Audubon Society

Five-Year Strategic Plan

April 2019

1. Introduction
 - a. Planning Process
 - b. Overview (Themes/Principles)
2. Mission Statement
3. Vision for the Future: Strategic Goals 2019-2024
 - a. Action Plans/Metrics
4. Roadmap for the next five years
5. Conclusion

Appendix

- a) Mission and Strengths Weaknesses Opportunities Threats (SWOT) analyses from 4 planning groups
- b) Planning Summit
- c) Previous plans
 - 1989-94
 - 1998-03
 - 2004-06
 - 2007-10
 - 2013-18

Introduction

The St. Louis Audubon Society began in 1915 as the St. Louis Bird Club. For over a century, we have advocated for birds and their habitats while using birds to connect our community to the natural world around us. In the last decade, we have developed many new partnerships and significant programming. While feedback from the former and participation in the latter have given us confidence in both, this Plan will provide guidance on further development and help us generate the resources to sustain those efforts.

Much has changed with our natural world since the early days of the 20th Century, and most of it for the better. Yet old challenges persist while new threats have emerged.

The loss of bird and wildlife habitat continues as our human footprint expands into small woodlots, open fields, and remnant wetlands. The effects of climate change are pervasive; it has been tied to shifting ranges of many bird species, changes in plant blooming and fruiting cycles, and expansion of breeding seasons for some pest organisms. Just as insidious, our physical disconnection from nature is being exacerbated by technological devices in every aspect of our lives, making it that much easier to simply “tune out.”

Early in our second century of operation, we find our work is more relevant and urgent than ever before. St. Louis Audubon leadership believes that we should help address those threats while continuing to serve the St. Louis community with our established programming (field trips, Bring Conservation Home, education and outreach) and public advocacy. This Plan is our roadmap to help us do both.

Planning Process

Early in the fall 2018, SLAS President Katy Fechter appointed a small working group to begin the process of updating the organization’s five-year plan. The “core group” was composed of President Fechter, Director of Programs Mitch Leachman, Director of Operations Amy Weeks, and Board members Stacey Ludlum and Dennis Martin.

The group began its work with a review of the previous plan, which covers the years 2013-18, and then developed an outline for the new process. An update was presented at the October 9, 2018 Board meeting, and a series of discussions was organized with Board members and other leaders around four subject areas: Finance/Membership, Conservation, Education/Outreach and the Board itself. Sessions were held in November to review the mission and goals for each area and to develop a comprehensive analysis on Strengths, Weaknesses, Opportunities and Threats (SWOT). Reports were compiled, shared with participants, and further edited; these formed the basis for a deeper consideration of St. Louis Audubon’s priorities and goals going forward. (see Appendix a)

This deeper dive was the focus of a day-long planning summit with Board members and other leaders on February 9, 2019. The purpose of this session was to build upon the previous planning discussions to identify SLAS's top priorities over the next five years.

Appendix b includes further detail on the planning summit, which, along with subsequent discussions with the Board and an invitation to the general membership for comment, serves as the basis for the following five-year plan.

Overview (Themes/Principles)

Several very important themes and principles emerge to guide SLAS in achieving its mission. These include:

- The need for sustainable finances to work through a period of planned deficit spending in order to grow and develop further;
- The importance of engagement with members, volunteers, and community partners;
- SLAS's role as a leading organization in public education and advocacy and the critical challenge of climate change;
- The need to increase the diversity of those engaged with and by SLAS, with focus on families, youth, and underrepresented groups.

These key principles and themes have been incorporated in a vision for the future with these strategic goals:

1. Increase volunteer participation and engagement
2. Improve communications
3. Provide leadership in building upon successful collaborations
4. Increase diversity of those with whom we engage and serve
5. Address needs for physical space

These strategies, along with action plans and metrics to assess progress, are described in more detail in this report. In addition, a roadmap for the next five years suggests milestones and objectives to achieve as the plan is implemented.

Mission

Throughout the deliberations leading up to this report, the current SLAS Mission statement served as a guidepost to steer our course. It simply and clearly states our purpose:

Creating a community connection to nature through education and conservation.

- **Foster an awareness and understanding of birds and other wildlife and their habitats;**
- **Educate our community so people can make informed decisions about the natural world.**

While mission statements were crafted for the Board, Conservation, Education/Outreach, and Finance/Membership areas (see Appendix a), all our planning efforts stem from this core mission.

Vision for the Future: Strategic Goals 2019-2024

The following five goals reflect the top priorities among many to guide SLAS's agenda over the next five years. Action plans and metrics are included to help identify tactical solutions to support our strategies and to lay the groundwork for ongoing assessment and course re-direction as needed.

1. Increase *volunteer participation and engagement*.

Action Plan/Metrics:

- a. Continue excellence in conservation activities.
 - i. Increase participation and revenue streams from Bring Conservation Home; track volunteer participants in all conservation and advocacy activities.
- b. Revitalize education and outreach efforts, inventory and evaluate program resources, content, staff/volunteers, and delivery.
 - i. Evaluate the quality and number of programs offered to schools.
 - ii. Focus scope on birds – how life science concepts relate to birds, why we should care about birds, things students can do to help birds.
 - iii. Track volunteers and participants in all education/outreach related activities, including partnership with St. Louis Community College.
 - iv. Continue the successful program of birding field trips while identifying additional volunteer trip leaders, exploring ways to improve participants' experience, and seeking to convert non-members to membership.
- c. Develop training for volunteers.
 - i. Establish an orientation program for Board members and committee chairs. Establish a training program for education/outreach participants. Evaluate these programs annually.
- d. Hire an education specialist as an intern to develop curriculum and pedagogic tools that can be made widely available, electronically, to enable the Education Team to efficiently expand its volunteer base to deliver programs.
 - i. Evaluate success after one year and recommend modifications, expansion, or discontinuation.
- e. Hire a BCH intern or part-time staff to assist with program execution and development
 - i. Evaluate success after one year and recommend modifications, expansion, or discontinuation.
- f. Seek more Board members, to a steady level of 20 or more.
 - i. Convene a committee to identify and recruit new members.

2. ***Improve communication, both externally and internally; establish and strengthen SLAS brand.***

Action Plan/Metrics:

- a. Design and implement a new SLAS website.
 - i. Utilize web diagnostics to measure activity levels. Evaluate the effectiveness of the website annually.
- b. Improve internal interactions between Board, conservation and education/outreach areas.
 - i. Increase the number of Board meetings.
 - ii. Assess current efforts to engage with members, volunteers, partners and develop new approaches as appropriate.
- c. Establish SLAS brand to identify and communicate who we are and to develop a range of supporting materials
 - i. examples: annual report, fund-raising materials, such as case statements, etc.
- d. Develop a public speaker program to generate greater awareness of and interest in SLAS

3. ***Provide leadership by building collaborations and partnerships with like-minded organizations to advocate for education, public discussion, and policy development on nature and quality of life issues facing the region.***

Action Plan/Metrics

- a) Seek opportunities to educate our community about the impacts of climate change and to advocate for solutions.
 - i. Track participation, evaluate success and report to the Board annually.
- b) Establish annual meetings with SLAS Board leadership and key partners to discuss joint initiatives and resource sharing and to plan future initiatives.
- c) Develop new partnerships to foster active living, outdoor recreation, neighborhood and community quality of life initiatives.
- d) Support data gathering and analysis as it relates to birds and the environment
 - i. Advance citizen science activities such as eBird, Climate Watch, the Christmas Bird Count.

4. ***Increase diversity of those with whom we engage and serve; focus on families, youth and underrepresented communities.***

Action Plan/Metrics

- a) Appoint a Task Force to:
 - i. report to the Board on diversity initiatives at the national level (NAS), at comparable chapter organizations, and from conservation-minded community leaders.

- ii. work with the Education/Outreach team and our Conservation committees and program staff to identify opportunities to extend our reach to underrepresented communities.
- iii. promote engagement of young and beginner birders; measure participation and evaluate programming annually.
- iv. make recommendations to the Board on how best to achieve this goal in a sustainable way.

5. *Develop short-term solutions and longer-term plans to **address needs for physical space** (education/outreach space, presentation and meeting space, staff space)*

Action Plan/Metrics

- a) Develop short-term solutions to space needs identified by the Education Team in support of their mission and priorities.
- b) Explore short-term shared space opportunities for staff offices and meeting space.
- c) Appoint a group composed of Board members, Finance committee members, and other individuals with capital planning and real estate expertise to explore longer-range plans and to conduct a feasibility study on options for SLAS to rent, lease, or purchase space.

Roadmap for the next five years

Not everything can be achieved at once. An incremental approach is practical and we are cognizant of the need for flexibility and adaptation to changing circumstances. The following roadmap suggests a way to move forward and suggests milestones necessary to achieve our goals as well as indicators to measure our progress.

First and foremost, to achieve these goals SLAS must be financially stable and able to grow its resources to meet mission. This will require a combination of significant increases in funding via new revenue streams and efficient alignment to priorities. It is imperative that SLAS move from current planned deficit spending to positive reserves to enable flexibility and expansion in achieving our missions. We anticipate achieving this goal within 4 years, with incremental improvement in our financial condition each year.

Year 1

- Establish new membership levels and contribution amounts, including corporate/sponsorship levels (Goal 1)
- Establish a fundraising committee to work with the staff to develop and implement a program aligned with our goals (Financial)

- Develop a financial model and business case, with requisite revenue projections, to support:
 - Hiring an education specialist as an intern to develop curriculum and tools to be made widely and easily available to support increased volunteer participation in education programs (Goal 1)
 - Hiring a new staff member to coordinate education-related activities (Goal 1)
 - Hiring (in year 2) additional BCH staff support (intern or part-time) to assist with program execution and expansion (Goal 1)
- Acquire and implement a Customer Relationship Management system (Goals 1 and 2)
- Improve website design and navigation (Goal 2)
- Develop branding strategy (Goal 2)
- Put in place short-term solutions to space needs identified by Education Team and Board (Goal 5)
- Survey SLAS community to establish a baseline on perspectives and views as the strategic plan launches (Goals 1, 2)
- Reduce annual operating deficit to less than \$15,000 (Financial)
- Develop an annual plan and report on progress at a special Board meeting called for this purpose

Year 2

- Appoint Task Force on Diversity charged to develop recommendations to increase engagement with families, youth and underrepresented communities (Goal 4, Goal 1, Financial)
- Increase BCH homeowner fee income from 2018 levels (Financial)
- Hire additional BCH staff support (intern or part-time) to assist with program execution and expansion (Goal 1)
- Hire new staff member to coordinate education-related activities (Goal 1)
- Appoint Task Force to explore long-range solutions to space needs (Goal 5, Financial)
- Increase annual appeal and donations by at least \$10,000 (Financial)
- Increase SLAS membership income and members (Financial)
- Reduce annual operating deficit to less than \$10,000 (Financial)
- Develop an annual plan and report on progress at a special Board meeting called for this purpose

Year 3

- Implement Task Force on Diversity recommendations (Goal 4)
- Increase corporate members/sponsors (Financial)
- Increase annual appeal and donations by at least \$10,000 (Financial)
- Increase SLAS membership income and members (Financial)

- Reduce annual operating deficit to less than \$5,000 (Financial)
- Develop an annual plan and report on progress at a special Board meeting called for this purpose

Year 4

- Appoint Board committee to evaluate progress on Strategic Plan. Adjust year 4 priorities accordingly
- Achieve positive annual operating results
- Develop an annual plan and report on progress at a special Board meeting called for this purpose

Year 5

- Develop an annual plan and report on progress at a special Board meeting called for this purpose
- Post-five-year plan survey of SLAS community to measure perspectives and views upon the conclusion of this planning period; contrast with pre-five-year plan survey in year 1
- Appoint Board committee to update Strategic Plan for next five years

Conclusion

SLAS finds itself in an important moment as it embarks upon a new five-year plan. The recent addition of a full-time staff member, recent successes in public policy advocacy on the environmental/conservation front, and an awareness that we must revitalize our education efforts give context to our planning. We also know that in order to reach our potential and fulfill our mission we require additional financial resources.

The challenge before us is clear. We will need a committed and fully engaged Board of Directors. Board members will be identified to oversee and monitor progress on each of the strategic goals we've identified. New task forces and committees on diversity and fund-raising and a feasibility study on long-range space needs are among the new initiatives we envision over the next five years. Our Board must lead and participate. We will need our professional staff to contribute with their leadership and hard work to all we do. We are fortunate to have this resource. We need our staff to work well together and to be aligned with our goals. We will need our volunteers, our greatest resource of all, to continue their dedication and engagement. In these ways we can build upon our tradition of excellence and go even further, as we must, in a period of climate change and with a need for education and public policy advocacy. In these ways we create a community connection to nature through education and conservation, we foster awareness and understanding of birds and other wildlife and their habitats, and we educate our community so people can make informed decisions about the natural world.

Appendix

- a) Mission and SWOT analyses from November 2018 planning sessions
 - i. [Board of Directors](#)
 - ii. [Conservation](#)
 - iii. [Education/Outreach](#)
 - iv. [Finance/Membership](#)
- b) Planning Summit, February 9, 2019
 - i. [Attendees](#)
 - ii. [Power point presentation](#)
 - iii. [Summary notes](#)
- c) Previous SLAS strategic plans
 - i. [1989-94](#)
 - ii. [1998-03](#)
 - iii. [2004-06](#)
 - iv. [2007-10](#)
 - v. [2013-18](#)