

Introduction

In 2018, the SEEDS Board of Directors committed to revising the organization's strategic plan. Work on developing SEEDS' new strategic plan began during the January 2019 SEEDS Board's annual retreat and continued through the end of July 2019. The results of this effort are contained below. In creating the strategic plan, the SEEDS Board worked to identify the most important areas needing focus in order to best capitalize on SEEDS' success over the past 10 years, and to best position the organization to drive its mission going forward.

The strategic plan consists of 6 high-level goals, each supported by more specific strategies, objectives, and action plans. We have strived to make the action plans SMART (i.e. specific, measurable, achievable, relevant, and time-bound) wherever possible. However, the SEEDS Board recognizes the need for flexibility when dealing with these important issues and therefore considers the strategic plan to be a living document, subject to the need for regular review and updates as are appropriate. As such, the SEEDS Board plans to implement its new strategic plan as follows:

- The current draft of the strategic plan will be published on the SEEDS website (seedsgroup.net) in advance of the SEEDS 2019 Annual Membership Meeting.
- The SEEDS Board will make a high-level presentation on the strategic plan at the SEEDS 2019 Annual Membership Meeting.
- Members will be asked to provide input to the strategic plan during a two-week period after the SEEDS 2019 Annual Membership Meeting.
- The SEEDS Board will review and incorporate member feedback and will publish an updated version of the strategic plan by the end of October 2019.
- The SEEDS Board will manage strategic plan action item deliverables at the bi-monthly SEEDS Board meetings.
- The SEEDS Board will review the current status of the strategic plan and its action items at the SEEDS Board's January 2020 annual retreat and will make changes as needed.
- The SEEDS Board commits to annual (at a minimum) reviews & updates to the strategic plan going forward. All updates to the strategic plan will be posted to the SEEDS website, and status of action plan deliverables will be made available to SEEDS members on request.

Definition of terms

- A **goal** is a broad primary outcome.
- A **strategy** is the approach you take to achieve a goal.
- An **objective** is a high-level measurable step you take to achieve a goal.
- An **action** is a specific set of tasks needed to achieve a stated objective
- Objectives & action plan tasks should be **SMART**:
 - o Specific
 - o Measurable
 - o Achievable
 - o Relevant
 - o Time-bound

SEEDS Strategic Plan

Goal 1: Ensure SEEDS has sufficient human resources.

Strategy 1.1: Increase the number of SEEDS volunteers.

Objective 1.1.1: Establish a volunteer discipline to accomplish:

- Recruit a volunteer coordinator.
- Create & maintain an inventory of volunteers.
- Establish communications channels for volunteers (ex: MailChimp).
- Create and manage a list of volunteer tasks.
- Create a list of volunteer tips (ex: welcoming newcomers to SEEDS).
- Clarify existing roles (ex: circle definitions & staffing).
- Drive volunteer outreach: youth, Ag community.

Action 1.1.1.1: Governance Circle to look for funding for a volunteer coordinator.

Date: 11/1/2019

Objective 1.1.2: Increase advisors' participation.

Action 1.1.2.1: Governance Circle to create plan for increasing advisor's participation.

Date: 5/1/2020

Note: Including revisit & document advisor responsibilities

Strategy 1.2: Strengthen the Board.

Objective 1.2.1: Define what it means to be a SEEDS Board member:

- Job descriptions, required skills, and time requirements for each Board position.
- Define financial contribution expectations for SEEDS Board members.
- Define Board member diversity objectives.

Action 1.2.1.1: Governance Circle to define what it means to be a SEEDS Board member.

Date: 7/1/2019

Objective 1.2.2: Create & maintain a list of potential new SEEDS Board members.

Action 1.2.2.1: Governance Circle will establish ability in SEEDS SharePoint site for managing list of potential Board members.

Date: 5/1/2019

Action 1.2.2.2: Governance Circle will create an initial list of potential Board members before the 2019 SEEDS Annual Membership Meeting.

Date: 8/1/2019

Objective 1.2.3: Update the welcome package for new Board members & make sure it is distributed.

Action 1.2.3.1: Governance Circle to update the welcome package for new Board members & make sure it is distributed.

Date: 7/1/2019

Objective 1.2.4: Create opportunities for Board member education.

Action 1.2.4.1: Governance Circle to look for opportunities for Board member education.

Date: 3/1/2020

Strategy 1.3: Ensure SEEDS has a strong staff working towards our mission

Objective 1.3.1: Establish processes for managing & prioritizing staff activities

Action 1.3.1.1: SEEDS Officers to establish processes for managing & prioritizing staff activities.

Date: 12/31/2020

Objective 1.3.2: Define Executive Director role & required skills

Action 1.3.2.1: SEEDS Officers to define Executive Director role & required skills.

Date: 12/31/2019

Objective 1.3.3: Create a "continuity plan" for the Executive Director position.

Action 1.3.3.1: SEEDS Officers to create a "continuity plan" for the Executive Director position.

Date: 12/31/2020

Objective 1.3.4: Create opportunities for Executive Director education.

Action 1.3.4.1: SEEDS Officers to look for opportunities for Executive Director education.

Date: 12/31/2020

Goal 2: Ensure SEEDS has appropriate governance structure.

Strategy 2.1: Establish a Governance Circle. The Governance Circle will:

- Address its deliverables in the strategic plan.
- Make recommendations to the Board dealing with issues related to SEEDS' governance including but not limited to organizational structure, mission, Board make-up and nominations.

Action 2.1.1: The SEEDS Board will follow SEEDS standard operating procedures to establish the Governance Circle.

Date: 4/30/2019

Strategy 2.2: Revisit SEEDS' mission & mission statement.

Action 2.2.1: The Governance Circle will review the SEEDS mission & mission statement, and provide feedback to the Board.

Date: 6/1/2019

Action 2.2.2: The Governance Circle will ensure that if any changes/improvements to the mission statement are required, all prep-work for getting membership approval will be completed prior to the 2019 SEEDS Annual Membership Meeting.

Date: 8/1/2019

Strategy 2.3: Define & document values/processes for how SEEDS addresses sensitive issues (in the public domain).

Objective 2.3.1: Establish SEEDS' values & processes related to our handling of sensitive issues.

Action 2.3.1.1: The Governance Circle will propose SEEDS' values & processes (related handling of sensitive issues in the public domain) to the SEEDS Board.

Date: 8/1/2019

Action 2.3.1.2: Governance Circle to make a presentation to the SEEDS membership on the work around SEEDS' handling of sensitive issues in the public domain at the 2019 SEEDS Annual Membership Meeting.

Date: 9/17/2019

Objective 2.3.2: Once approved, the Governance Circle will apply the values & processes to the following current sensitive issues:

- Climate Change
- Fracking
- Green New Deal

Action 2.3.2.2: Governance Circle to pick a sensitive issue, work through the process, and present to the SEEDS Board.

Date: 12/1/2019

Strategy 2.4: SEEDS will evaluate & seek to improve its governance model including (but not limited to) our use of the sociocracy governance model.

Objective 2.4.1: Ensure a better understanding of the sociocracy model.

Action 2.4.1.1: Governance Circle will review & update sociocracy documents.

Date: 7/1/2020

Goal 3: Ensure SEEDS has sufficient financial resources to achieve its mission.

Strategy 3.1: Develop a SEEDS-wide culture of financial sustainability.

Objective 3.1.1: Formalize fundraising oversight and coordination as a responsibility within an existing circle. Financial sustainability will be a responsibility of each circle, in that they will be responsible for helping find funding for their projects.

Action 3.1.1.1: SEEDS Board to add fundraising to Finance or Outreach circle.

Date: 5/31/2019

Action 3.1.1.2: Delineate expectations/evaluation criteria.

Date: 9/20/2019

Action 3.1.1.3: Develop general fundraising training materials.

Date: 9/20/2019

Action 3.1.1.4: Share with Board.

Date: 10/31/2019

Action 3.1.1.5: Share with Circles.

Date: 9/20/2019

Objective 3.1.2: Identify Board roles as related to fundraising

Action 3.1.2.1: Review and update Board member Job Description, new board member/circle member handbook, etc.

Date: 8/31/2019

Action 3.1.2.2: Become a 100% giving Board – Board members will give annually at a level that is meaningful to them.

Date: 8/31/2019

Action 3.1.2.3: Board and circle members to provide names and addresses of 10 potential individual donors and 3 business donors each year. Ask them to the Annual General meeting.

Date: 8/31/2019, annually

Action 3.1.2.4: Board and circle members to assist with personalization of appeals and thank you notes.

Date: 11/30/2019, annually

Action 3.1.2.5: Ensure sign-up sheets at all events are entered into potential donor database.

Date: ongoing

Objective 3.1.3: Provide Board with dashboard report on fundraising efforts as part of regular financial reports.

Action 3.1.3.1: Develop key metrics to measure and track progress to share with the board.
Date: 12/31/2019

Strategy 3.2: Develop a comprehensive fundraising plan with calendar and deadlines. Document fundraising goals on an annual basis including three areas below.

Objective 3.2.1: Improve individual and business donor relationships and giving. Expand business membership. Define benefits for different levels of support (website, email, promotion). Identify local, regional and national businesses that may be potential donors.

Action 3.2.1.1: Create a single donor database that includes both donor history and mailing information for both individuals and businesses. Evaluate duplicating donor history into SharePoint and move into SharePoint if possible.
Date: 8/31/2019

Action 3.2.1.2: Move to a different donor database if needed. Evaluate annually.
Date: 12/31/2019, annually

Action 3.2.1.3: Discuss clarification and simplification of member versus donor definition and tracking for overall consistency.
Date: 1/31/2020

Action 3.2.1.4: Finalize clarification and simplification of member versus donor definition and tracking for overall consistency.
Date: 4/30/2020

Action 3.2.1.5: Host brainstorming session with Seeds insiders with fundraising expertise to discuss improvement of year end appeals in conjunction with overall outreach plan activities with individualized solicitation, improved giving options, a broader coordinated range of solicitation vehicles (email, Facebook), and a single page annual report for use with donors.
Date: 6/30/2020

Action 3.2.1.6: Draft fundraising plan with annual improvements.
Date: 11/30/2019, annually

Action 3.2.1.7: Define member benefits (business corner, highlights on social media, etc.)
Date: 6/30/2020

Action 3.2.1.8: Implement begins with dedicated volunteer.
Date: 1/31/2021

Action 3.2.1.9: Promote alternate ways to support SEEDS as part of ongoing outreach plan such as AmazonSmile, Facebook cause, Lake Region Community Dock Foundation at IGA, etc. **Date: 12/31/2020**

Action 3.2.1.10: Create outreach materials to describe planned giving options such as bequests. **Date: 12/31/2021**

Action 3.2.1.11: Identify and meet with significant donors to understand values, and giving preferences. Meet with 3 donors in 2019, 6 in 2020, and 12 in 2021. **Date: 12/30/2019, annually**

Action 3.2.1.12: Document giving history for individuals and businesses and set annual growth goals that are tracked and reported to the board and membership. Document in June 2019, then set annual goals beginning in Jan 2020 **Date: 1/31/2020, annually**

Objective 3.2.2: Evaluate and improve existing fundraising events. Evaluate events as fundraising or friend-raising. Ensure all costs (including staff time) are factored into performance review.

Action 3.2.2.1: Review of Swapapalooza and Green Fair, etc. **Date: 7/31/2019**

Action 3.2.2.2: Review annually in January **Date: 1/31/2020, annually**

Action 3.2.2.3: Identify ways to improve existing events – to capitalize on fun, and increase fundraising. October 2019 Brainstorming. **Date: 10/31/2019**

Action 3.2.2.4: Document fundraising history for events (ongoing) and set annual growth goals that are tracked and reported to the board. **Date: 1/31/2020**

Objective 3.2.3: Develop a comprehensive Grant calendar to maximize success. Expand existing grant spreadsheet to be a grants calendar and tracking worksheet. Create a list of potential projects that are candidates for grant funding as identified in the strategic plan, and by individual circles. Ideas such as improved website, new computer equipment, as well as additional funding for projects underway.

Action 3.2.3.1: Set brainstorming session annually to look for these ideas as well as “easy lift projects” that will provide administrative support and serve the mission of SEEDS (such as purchasing solar installation books or educational kits for school, library, etc.). **Date: 3/31/2020**

Action 3.2.3.2: Evaluate current grant funding sources and review potential additional sources. Leverage membership with NEPA Alliance for access to grants database to research sources. **Date: 10/31/2019, annually**

Action 3.2.3.3: Document fundraising history of grants.

Date: 6/30/2019

Action 3.2.3.4: Set annual growth goals that are tracked and reported to the board.

Date: 1/31/2020

Goal 4: Develop an effective outreach plan to articulate SEEDS' mission and core messages to its target audiences.

Strategy 4.1: Review target audiences and outcomes.

Action 4.1.1: Document fundraising history of grants.

Date: To Be Determined

Action 4.1.2: Members – increase membership

Date: To Be Determined

Action 4.1.3: Volunteers – identify in database and enews targeted list

Date: To Be Determined

Action 4.1.4: Community members with a connection to SEEDS i.e. GOT, energy audit participants, workshop attendees – convert them to members

Date: To Be Determined

Action 4.1.5: Community at large not yet touched by SEEDS

Date: To Be Determined

Action 4.1.6: Business community & collaborators – Convert them to contributors or supporters

Date: To Be Determined

Action 4.1.7: Youth – Engage them as volunteers

Date: To Be Determined

Action 4.1.8: Legislators – Increase their awareness and support of SEEDS' work

Date: To Be Determined

Action 4.1.9: Current Funders – Deepen relationships, increase contributions

Date: To Be Determined

Strategy 4.2: Review current outreach tools.

Objective 4.2.1: *E-newsletter* – Sent monthly to approximately 1,300 email addresses. The general list includes members, businesses, volunteers.

Action 4.2.1.1: Evaluate e-newsletter (See Outreach meeting minutes, July 3, 2019)

Date: 9/11/2019

Action 4.2.1.2: Streamline the editorial and production workflow

Date: 9/30/2019

Action 4.2.1.3: Review/update content calendar in SharePoint

Date: 10/31/2019

Action 4.2.1.4: Develop a set of deadlines for the year

Date: To Be Determined

Action 4.2.1.5: Evaluate design, including transition to a mobile responsive template

Date: To Be Determined

Objective 4.2.2: *Press Releases* – Distributed on an as-needed basis, mostly event-driven.

Action 4.2.2.1: Develop an annual schedule of event-related press releases

Date: To Be Determined

Action 4.2.2.2: Update the media list

Date: To Be Determined

Action 4.2.2.3: Expand PR to include organizational achievements, community collaborations, etc.

Date: To Be Determined

Action 4.2.2.4: Evaluate the potential for a recurring column or broadcast segment. What are the resources required to sustain it?

Date: To Be Determined

Objective 4.2.3: *Website* – Contains core messages, recent news, event and program information, sustainability resources, membership information, PayPal donor option.

Action 4.2.3.1: Evaluate website overall by end of year and make recommendations.

Date: To Be Determined

Action 4.2.3.2: Immediate technical support to fix the PayPal donation error

Date: 7/31/2019

Action 4.2.3.3: Ongoing, responsive technical support

Date: To Be Determined

Action 4.2.3.4: Review current content

Date: To Be Determined

Action 4.2.3.5: Evaluate for potential redesign.

Date: To Be Determined

Action 4.2.3.6: Include more fundraising focus

Date: To Be Determined

Objective 4.2.4: *Facebook Page* – The only social media tool currently in use. Has multiple volunteer and staff admins. Used for sharing events, organizational news, sustainability news, and collaborator news/info.

Action 4.2.4.1: Set a social media policy for the organization

Date: 9/31/2019

Action 4.2.4.2: Consider adding an Instagram account

Date: To Be Determined

Action 4.2.4.3: Develop a schedule for post timing and content

Date: To Be Determined

Action 4.2.4.4: Review the Facebook page name to help people find it more easily

Date: To Be Determined

Objective 4.2.5: *Special Events & Workshops* – March member social, April NEPA Green Fair, May Swapapalooza (*is this fund- or friend-raiser?*), June DIY Solar, September Annual Meeting, November Book Swap.

Action 4.2.5.1: Evaluate the organizational resources needed to produce each event as compared to the outcomes i.e. fundraising, increased membership, community partnerships, educational outreach, achievement of organizational mission.

Date: To Be Determined

Objective 4.2.6: *Annual Meeting* – Primary membership gathering.

- Friend-raising and better awareness of SEEDS accomplishments
- Highlight partnerships
- Elect new officers, board members
- Make by-laws changes, if necessary

Objective 4.2.7: *NEPA Recycles website* – A collaborative project among SEEDS, the Recycling Center, the Wayne Conservation District, and Wayne Tomorrow.

Action 4.2.7.1: Develop it into a comprehensive go-to site

Date: To Be Determined

Objective 4.2.8: *Printed Materials* – letterhead, brochures, rack card, t-shirts.

Action 4.2.8.1: Evaluate branding for consistency and usefulness

Date: To Be Determined

Objective 4.2.9: *Community Calendars* – Greater Honesdale Partnership (email list), Downtown Hawley Partnership (must be a registered user to enter calendar items), Wayne County government calendar, Chamber of Northern Poconos.

Action 4.2.9.1: Find volunteers or intern to enter events

Date: To Be Determined

Objective 4.2.10: *Sharing Collaborator News* – Selectively promote on the SEEDS' website, social media, in e-newsletter.

Action 4.2.10.1: Set a strategy or policy for sharing partner news.

Date: To Be Determined

Action 4.2.10.2: Evaluate whether SEEDS should be a clearing house for this information.

Date: To Be Determined

Action 4.2.10.3: Collect innovations/good news related to sustainability, which can be plugged into outreach tools per the policy

Date: To Be Determined

Strategy 4.3: Review core messages.

Objective 4.3.1: Develop an elevator speech and talking points or a messaging doc for staff, Board, volunteers, members to convey SEEDS work and mission.

Action 4.3.1.1: Update core messages

Date: 12/31/2019

Objective 4.3.2: Better understand objections and obstacles to sustainable living to Improve messaging for non-believers. Develop talking points around these topics.

Action 4.4.1: Re-activate the Communications Circle

Date: 7/31/2019

Action 4.4.2: Re-activate the Fundraising Circle

Date: 7/31/2019

Action 4.4.3: Review outreach tools to ensure that they lay the groundwork for annual giving

Date: 7/8/2019

Action 4.4.4: Develop a content calendar that includes topics and deadlines for all outreach tools

Date: 8/14/2019

Action 4.4.5: Evaluate the enewsletter for possible redesign

Date: 9/11/2019

Action 4.4.6: Evaluate the SEEDS website for possible redesign. Create an RFP.

Date: 12/31/2019

Action 4.4.7: Evaluate the NEPA Recycles website for resources needed to maintain it and to grow it either as a SEEDS project or under another umbrella such as the Wayne Tomorrow Sustainability Committee

Date: 6/10/2019

Goal 5: Ensure SEEDS has an appropriate organizational structure for the renewable energy & energy efficiency spaces.

Strategy 5.1: Combine the current Solar & Energy Efficiency Circles to create a new Energy Circle

Objective 5.1.1: Create new Energy Circle.

Action 5.1.1.1: Energy Workgroup to identify Energy Circle representative to the SEEDS Board.

Date: 7/31/2019

Action 5.1.1.2: Energy Workgroup to define the Energy Circle's mission.

Date: 7/31/2019

Action 5.1.1.3: SEEDS Board to approve creation of the new Energy Circle.

Date: 8/31/2019

Goal 6: Identify current & future projects/programs for the new Energy Circle.

Strategy 6.1: Identify the projects/programs that the current members of the Solar & Energy Efficiency Circles are committed to, and create a list of potential projects/programs that the new Energy Circle could take on if there were additional resources (primarily interested volunteers) available.

Objective 6.1.1: Create the list of committed & potential projects/programs for the new Energy Circle.

Action 6.1.1.1: Energy Circle to create the list of currently committed projects/programs for 2019.

Date: 7/31/2019

Action 6.1.1.2: Energy Circle to create the list of potential projects/programs.

Date: 7/31/2019