



*A Project Of*  
**Earth Island Institute**

## **Strategic Plan 2009**

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**KIDS for the BAY**  
**STRATEGIC PLAN 2009**

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# **KIDS for the BAY**

## **STRATEGIC PLAN 2009**

### **Introduction by the President of the Advisory Board**

March 2, 2009

**Dear KIDS for the BAY Friends and Supporters,**

It gives me great pleasure to present to you the 2009 Strategic Plan of KIDS for the BAY. Over the last eight months, Mandi Billinge and her staff, along with the Leadership Committee of the Advisory Board, have worked diligently to discuss, identify and prioritize the path forward for the organization. The resulting Strategic Plan outlines four core strategies that KIDS for the BAY will implement over the next three to five years—priority areas that will guide the organization’s work in service to its mission, vision and values.

Our mission — KIDS for the BAY collaborates with teachers to inspire environmental consciousness in children and cultivate a love of learning — is one that the entire organization remains steadfastly committed to, and is the ultimate driver in the creation of this Strategic Plan. I am extremely proud of Mandi, the entire staff and the Leadership Committee of KIDS for the BAY in developing, with great commitment, focus and energy, the 2009 Strategic Plan. On behalf of the Leadership Committee of the Advisory Board I approve this plan, and eagerly await your feedback. Many thanks for your continued support of KIDS for the BAY.

Sincerely,



**Lani Alo**

President, Advisory Board

# **KIDS for the BAY**

## **STRATEGIC PLAN 2009**

### **Executive Summary**

#### Introduction

The KIDS for the BAY 2009 Strategic Plan was created over an eight-month period of consulting with staff and Advisory Board members and with reference to our in-depth program evaluation reports, which provide extensive feedback from our program participants. A staff retreat and many Leadership Committee meetings were dedicated to the development of the plan as well as a series of meetings between the administrative staff of KIDS for the BAY.

#### Mission Statement

KIDS for the BAY collaborates with teachers to inspire environmental consciousness in children and cultivate a love of learning.

#### Vision Statement

KIDS for the BAY is striving to create a world in which:

- ◆ all children:
  - have direct access to nature and to meaningful, educational experiences in nature
  - learn hands-on environmental science in the classroom and in the outdoors
  - are engaged and active environmental stewards, who make a difference in their environment, make positive environmental choices in their lives and understand environmental justice issues.
- ◆ all teachers feel supported in teaching environmental education and have all the resources they need to effectively teach and engage their students.
- ◆ all schools strongly value environmental education and have integrated it into the school wide curriculum and culture.

#### Values Statement

KIDS for the BAY is committed to:

- ◆ being a model organization in the field of environmental education
- ◆ diversity
- ◆ place-based environmental education.

## Core Strategies

Four core strategies were developed during the strategic planning process, which will guide our work and define our program and administrative priorities over the next three to five years.

### **ONE: Optimize the efficiency of all KIDS for the BAY operations.**

#### Background

There is a pressing need to ensure organizational and fiscal stability and to increase cash flow in the current challenging economic climate. In order to achieve this we will need to increase service revenue, individual donations, foundation and corporate funding and to increase the efficiency of our government invoicing process. We will need to assess the administrative staff needs of the organization and ensure the maximum efficiency of our administrative staff plan with the resources available.

Through the strategic planning process we have identified the programs we will focus our resources on over the next three to five years. There is a need to ensure that all projected expenses for these programs are in-line with actual costs and that these programs are most efficiently staffed to ensure the highest quality and the maximum return on funders' investments.

### **TWO: Develop a Governance Strategy for KIDS for the BAY**

#### Background

As a project of Earth Island Institute (EII) the EII Board of Directors is legally and fiscally responsible for KftB. Therefore KftB does not require an official Board of Directors. KftB has managed an Advisory Board/Leadership Committee for the past eight years, which has advised on and assisted with important leadership issues over the years. As a result of discussions in strategic planning, the need to more clearly define the role of the Advisory Board/Leadership Committee and to determine how it can be most helpful to the organization has arisen as a high priority.

### **THREE: Increase the Visibility of KIDS for the BAY**

#### Background

KftB is well known in the field of environmental education and is the recipient of three national and several local awards that recognize our best practices in the field. We are well known and well represented in local and regional environmental education networks. However, our work and our organization are not well known to the general public. There is a need to increase our visibility in the San Francisco Bay Area to appeal to individual donors and potential new funders and clients.

### **FOUR: Expand our programs by expanding our operations on a regional basis.**

#### Background

KftB programs have a local, place-based focus. Therefore our funding base is very local. In order to expand our programs, there is a need to expand to new regions to maintain the local, place-based focus of our work and to attract local funding sources. Possible new target regions

include: San Mateo County, San Francisco, the North Bay, Silicon Valley and the Peninsula. We often receive inquiries from potential clients for our services from all of these areas. The need for our programs seems to be as strong in these regions as it is here in the East Bay. There is a need to assess potential funding and fee-for-service income available in these new regions and expand our services as appropriate.

### Moving Forward

This is an exciting time for KIDS for the BAY as we move forward to develop and implement our core strategies over the next three to five years. We look forward to the creative work that we will accomplish to fulfill our mission and deliver our high quality programs in environmental education.

Thank you to the KIDS for the BAY staff for their thoughtful input to the creation of the vision and values statements and to the Leadership Committee of the Advisory Board for their participation in developing all aspects of the Strategic Plan.

# **KIDS for the BAY**

## **STRATEGIC PLAN 2009**

### **Mission Statement**

KIDS for the BAY collaborates with teachers to inspire environmental consciousness in children and cultivate a love of learning.

### **Vision Statement**

#### **EXTERNAL VISION**

#### **KIDS for the BAY is striving to create a world in which:**

- The natural and built world is clean and healthy and all children and citizens are engaged in active environmental stewardship.
- The San Francisco Bay Delta Estuary is a clean and healthy environment that all children and residents protect and restore.
- The field of environmental education embraces diversity, best practices and education through action.
- All schools strongly value environmental education and it is integrated into the school wide curriculum and culture.
- All teachers feel supported in teaching environmental education and have all the resources they need to effectively teach and engage their students.
- All children:
  - have direct access to nature and to meaningful, educational experiences in nature
  - learn hands-on environmental science in the classroom and in the outdoors
  - are engaged and active environmental stewards, who make a difference in their environment, make positive environmental choices in their lives and understand environmental justice issues.
- All parents are actively engaged in their children's environmental education experiences and learn environmental literacy from their children.

## **INTERNAL VISION**

### **KIDS for the BAY is a model organization that:**

- has an excellent reputation for best practices
- values diversity
- meets the needs of target communities
- uses an effective evaluation process to consistently analyze the impact of our work and improve our programs.

### **The ideal KIDS for the BAY programs:**

- are fun, hands-on, challenging, exciting
- teach science process skills and current California Science Standards
- are high quality, in-depth and incorporate best practices
- deliver outdoor, nature exploration experiences that are safe, engaging, inspiring and informative
- make effective use of the best possible, affordable scientific and educational equipment
- inspire and empower students to educate others, take positive environmental action and make positive behavior changes
- are culturally relevant and inclusive and teach about environmental justice issues
- provide long-term support for teachers
- inspire and empower teachers to use the local environment as a significant educational resource and to teach their students environmental stewardship
- are integrated into the school wide culture and curricula of target schools
- engage parents in meaningful environmental education experiences with their children
- enhance, protect and restore the environment.

### **In the ideal KftB organization the staff:**

- are well-qualified, well-trained professional people committed to a high standard of excellence in their work
- reflect the diversity of the communities of the San Francisco Bay Area
- are happy, motivated, challenged and fulfilled in their work
- care deeply about the clients and constituents of KftB, about education and about the environment
- are advancing their careers through professional development opportunities and new responsibilities and challenges
- work well independently and as a team, supported and inspired by one another
- are compensated appropriately, have full health benefits coverage and vacation benefits.

### **The ideal KIDS for the BAY Board of Directors:**

- is committed to the mission and vision of KftB and consistently volunteers time to further this mission and vision
- makes a personally significant annual donation to KftB
- is actively engaged in fundraising for KftB from individual donors
- connects KftB with potential foundation, corporate and government funders
- positively represents KftB to the community, enhances its public image and advocates on its behalf, for example by nominating KftB for awards

- is actively involved in KftB Board meetings and committee meetings
- identifies and helps to recruit effective new board members with needed roles and responsibilities
- provides expertise on board development
- selects an effective President in collaboration with the Executive Director
- has positive, open communication with KftB staff
- supports the Executive Director in all decisions and actions consistent with the mission, policies and plans for KftB
- effectively evaluates the work of the Executive Director
- completes effective self-evaluation under the direction of the President
- helps to develop and ensure the success of KftB special events
- is committed to and actively engaged in the strategic planning process and the accompanying fundraising plan for KftB to succeed.

**KIDS for the BAY development and fundraising ideally includes:**

- a long term strategic fundraising plan
- an effective annual plan that is realistic with achievable goals and builds on the previous year's fundraising success
- a significant percentage of funding (more than 10% of the budget) from a strong and growing base of individual donors who give regular major donations and increase their donation size each year
- a personally significant annual gift from every Advisory Board member
- new and long-term funding from foundations, corporations and government funders
- long lasting, in-depth relationships with donors and funders
- steadily increasing fee-for-service revenue
- a planned giving program
- the funding base needed and ability to launch a capital campaign if needed
- a creative and effective fundraising team
- good communication between the fundraising team and program staff
- a high profile organization that has excellent name recognition and an excellent reputation
- frequent recognition with high profile local, regional and national awards
- use of the latest, most effective technology, for example the website, computers, networking, wealth engine software and 990 forms to determine donor giving capacity
- branded merchandise sales
- meaningful volunteer opportunities for donors and supporters
- a reserve fund to support positive cash flow.

**KIDS for the BAY collaborations with other environmental and environmental education organizations:**

- are practical, concrete, meaningful and mutually beneficial
- help to advance excellent practices in the field of environmental education
- can only occur when potential collaborating organizations share similar core values to KIDS for the BAY.

## **The ideal KIDS for the BAY facility includes:**

### **INDOOR SPACE**

- Office space = people are grouped but space is open (no private office spaces)
  - Fundraising/administrative office
  - Program staff office space with large communal table for working, computers, and individual desks
  - Areas will be connected
- Conference/meeting room- private, with media capabilities, coffee station
  - Gallery area within conference room
- Foyer/entry area separate from work areas
  - Gallery space
- Kitchen, social area w/ seating and table space
- Indoor bathroom (private, unisex)
- Equipment storage space
- Mural
- Green certified building
- Bike rack/space

### **OUTDOOR SPACE**

- 1 shaded outdoor garden/meeting space
- Equipment storage space (i.e. garden equipment)
  - Refrigerator/freezer for equipment
- Parking area and loading/unloading area
- Bike rack (covered)
- Sink/cleaning station
- Compost area
- Mural
- Greenhouse for starting plants and garden station
- Grey water system as model

## Values Statement

KIDS for the BAY is committed to:

- being a model organization in the field of environmental education
- diversity
- place-based environmental education.

### Guiding Principals

Because we are committed to **being a model organization in the field of environmental education** we will:

- consistently deliver high quality, in-depth programs, which have a lasting impact
- maintain a positive working community which includes the following practices:
  - appreciation, positive reinforcement and encouragement
  - internal professional development
  - internal agreement on how to relate in the workplace
  - maintaining a social committee
- continue our commitment to diversity
- consistently be open to adapting to a changing environment using an effective evaluation process
- maintain a consistent presence in environmental education networks and at environmental education conferences
- lead educator training workshops to model best practices
- practice the environmental principles that we teach including waste reduction, carpooling, water conservation, energy conservation and others.

Because we are committed to **diversity** we will:

- work with all communities of people in our programs and particularly target low-income communities and people of color for our scholarship programs
- incorporate the knowledge and experience of the students we teach into our programs
- ensure that our programs are multicultural, inclusive and relevant to the populations of students that we teach
- ensure that our programs are accessible to all students through the variety of learning styles (kinesthetic, visual and auditory) and to students for whom English is not their first language
- work to ensure that students with special needs have the opportunity to participate in our programs
- teach about environmental justice issues
- provide diverse role models for students, teachers and the community

- appoint staff and Leadership Committee Members who reflect the diversity of the communities we work with
- provide internal professional development focused on diversity and environmental justice issues.

Because we are committed to **place based environmental education** we will:

- take students and teachers out of the classroom and into the local natural and urban environment for hands-on learning experiences
- teach about local environmental issues and share local environmental news
- encourage classes to choose their own action project that is relevant for their local environment and community and encourage student ownership in the selected action projects
- as far as possible select field trip sites that are accessible by public transport so that students can easily return to the sites with their families
- collaborate with local organizations to enhance our programs.

# **KIDS for the BAY**

## **STRATEGIC PLAN 2009**

### **History and Profile**

#### **ORGANIZATIONAL TIME LINE**

- 1992** Organization founded by Mandi Billinge  
Original name: Estuary Action Challenge  
First fiscal sponsor: Friends of the San Francisco Estuary  
Initial programs conducted in Berkeley elementary schools funded by a small stipend from Friends of the Estuary  
Working out of a home based office
- 1993** First school wide program, focus on creek education, at John Muir Elementary School in Berkeley, funded by grants from the Berkeley Education Foundation and Berkeley Special Enrichment Program  
First government grant received to conduct programs with ten classes in Oakland and Berkeley schools
- 1994** Program developed in Pittsburg funded by mitigation money from the Regional Water Quality Control Board  
Developed Classroom Presentation and Field Trip fee-for-service programs
- 1995** Changed fiscal sponsor to Earth Island Institute  
Began receiving private foundation funding: the lead funder was the San Francisco Foundation  
Developed programs with a more specific focus: Pollution Reduction/Safe Bay Food Consumption and Urban Creek Education Programs  
Hired our first Program Coordinator  
Expanded to serve Berkeley, Oakland, Richmond and San Pablo Schools
- 1996** Local award: Future of the Bay Award from Save the Bay
- 1999** Expanded to hire two Program Coordinators
- 2000** Developed the Aquatic Science Adventure Summer Camp fee-for-service program  
Developed first Advisory Board  
Moved into office at 1771 Alcatraz Avenue Berkeley
- 2001** Expanded to hire three program staff  
Launched new School Wide Creek Education Program at Stege School in Richmond
- 2002** Celebrated our Ten Year Anniversary

- Began soliciting individual donations  
 Changed our name to KIDS for the BAY, began branding with new logo and new mission statement  
 Programs served 100 teachers and 2,800 students each year  
 Programs operating in four cities in two counties
- 2003** Awarded county government contract to provide Four Rs Action Program in Alameda County  
 Awarded contract to provide Watershed Action Program (WAP) in unincorporated Contra Costa County  
 Awarded state government contract to develop the Watershed Action Program  
 Expanded to seven staff  
 Shefali Shah promoted to Education Director  
 Sheela Shankar promoted to Education Director
- 2004** Awarded contract to provide the Watershed Action Program in incorporated Contra Costa County  
 Launched new School Wide Creek Education Program at Vallemar School in Pacifica
- 2005** Expanded the Aquatic Science Adventure Camp  
 Hired our first Development Director  
 Began Internal Professional Development Program for all KftB staff  
 First national award: EPA Region Nine Award for Environmental Excellence  
 Upgraded our evaluation system to include quantitative as well as qualitative measures  
 Began delivering educator training workshops at regional conferences  
 Began working with regional environmental education networks including the East Bay Environmental Education Network and the Evaluation Learning Community
- 2006** Awarded three-year contract with California Bay-Delta Project (state funding) for the WAP with a salmonid focus  
 Awarded NOAA contract to include National Marine Sanctuaries in WAP instruction in Alameda County, received this funding for three years  
 Awarded four-year contract with Alameda County Clean Water Program to provide the Storm Drain Rangers Program  
 Expanded the Four Rs Action Program to Contra Costa County  
 Developed new Mini Beast Summer Camp for younger children
- 2007** Sheela Shankar promoted to Associate Director  
 Local award received – the Contra Costa County Watershed Education Award  
 Second national award received – the Education Award from Coastal Living Magazine  
 Programs served 250 teachers and 4,600 students each year  
 Programs operating in 24 cities in four counties  
 Developed new Leadership Committee/Advisory Board  
 Celebrated our Fifteen Year Anniversary  
 Hosted two international delegations; Goldman Environmental Prize Winner T.S. Munkhbayer and a group of environmental scientists from the Ukraine

First comprehensive Program Evaluation Reports published on our website for three major programs  
Evaluation reports recognized and featured on MEER (“My Education Evaluation Resource) website through the University of Michigan

- 2008** Third national award received – “Outstanding service to the field of environmental education” from the North American Association of Environmental Education (NAAEE)  
New donor database developed with a service grant from the Taproot Foundation  
Selected for high profile outreach opportunity at Outside Lands Festival with the Jack Johnson Foundation  
New Summer Academy for Educators program developed by Shefali Shah  
Leilani Alo accepted position as President of the Advisory Board  
Launched new Urban Wilderness Classroom school wide program  
Evaluation report recognized and featured on the NOAA B-WET (Bay Watershed Education Training) website  
Began our Strategic Planning process

## **DESCRIPTION OF PREVIOUS AND CURRENT STRATEGIES**

### **Commitment to Place-Based Environmental Education**

KftB was founded on the principal of working with students and teachers in their local school environment on locally relevant environmental issues.

### **Promote Education Through Action**

We have always worked to empower students with the knowledge that they can make a difference and provided the opportunity for students to act to help solve local environmental problems. This commitment shapes our program development.

### **Bring Hands-on Science to Target Schools**

KftB has a strong history of engaging students and teachers in hands-on science in the classroom and in the outdoors. In low-income, urban schools the KftB program has often been the only hands-on science experience that students and teachers had all year.

### **Ensure our Programs have Lasting Impact**

This has always been a commitment of KftB and is apparent in our unique, in-depth, hands-on Teacher Training model and our School Wide Impact approach.

### **Commitment to Diversity**

This principal has always been strongly to the forefront of all KftB activities and guiding principals. It helps to determine the communities our programs serve, the content of our programs, how we ensure access to learning for all students, the diversity of our staff and Advisory Board.

“In diversity there is beauty and strength.”

Maya Angelou

### **Thoughtful Expansion as Resources Allow, Balancing Quality with Quantity**

As we gradually expanded our operations and services over the past sixteen years, KftB strived to maintain the quality of our programs and of our relationships with our partner teachers, students, principals, funders and donors and within our own community of our staff and Leadership Committee.

### **Develop a Positive, Committed Community of Staff**

KftB has provided a positive work environment, excellent health and vacation benefits and professional development opportunities for our staff. We have also strived to value all staff members and their unique contributions to our organization. We often hire people based more on their potential than on their current qualifications and experience and then provide comprehensive support and training, plus professional development opportunities, for staff to develop the skills needed to succeed in their position. This strategy has been very successful to date.

## **CURRENT PROGRAMS AND INFRASTRUCTURE**

### **Current KIDS for the BAY Programs**

KIDS for the BAY currently provides programs for 4,000 students and 200 teachers each year in Alameda and Contra Costa Counties. These programs include:

- Watershed Action Program provides interactive classroom workshops and field trips to local creek and bay habitats. Students learn their place in the watershed and choose how to take action to help clean up and restore their local watershed.  
(36 teachers and 1,080 student participants)
- Storm Drain Rangers Program engages teachers, students and their families in learning about their local watershed, how it is connected to the larger San Francisco Bay watershed and how they can take personal action to reduce urban runoff pollution.  
(20 teachers and 600 student participants)
- Bay Estuary Scientists brings the San Francisco Bay Estuary into the classroom. Young scientists investigate animals and plants that live in the bay, create a three-dimensional bay model, make food chain connections and learn to take personal action to help reduce urban runoff pollution.  
(20 teachers and 600 student participants)
- Creek and Bay Field Trip Explorations takes students and teachers on fieldtrips to explore aquatic ecosystems. Each experience involves close-up, hands-on encounters with nature in an urban environment.  
(20 teachers and 600 student participants)

- Wildcat Creek Clean-Up: KIDS for the BAY partners with the City of San Pablo and all the schools in San Pablo to organize the annual Wildcat Creek Clean Up Event. This event was originally developed by two third grade classes from Dover School who participated in a KIDS for the BAY program. It is now an established annual event in San Pablo for the past thirteen years.  
(18 – 20 teachers and approximately 500 students and their family members)
- Our Reduce, Reuse, Recycle, and Rot (Four Rs) Action Program teaches students and their families how to reduce the waste stream and decrease the amount of refuse entering waterways and landfills.  
(5 teachers and 150 student participants).
- Urban Wilderness Classroom: This school wide program transforms a corner of an urban school yard into a beautiful outdoor nature classroom including a pond, edible garden, bird and mini beast habitats, native plant landscapes, a composting facility, greenhouse, nursery and tool shed. Every grade level adopts a habitat that teaches the science standards for their grade level. Lessons build concepts and skills from one grade level to the next. School wide projects and celebrations and monthly workdays develop school community.  
514 students, 30 teachers
- Academic Credit For Teachers: teachers receive four units of credit from Cal State East Bay for participating in our Watershed Action or our Four Rs Action Programs. Teachers really appreciate the opportunity to learn alongside their students and receive academic credit towards their professional license as part of the KftB professional development package.
- Our Summer Academy for Educators provides a week-long summer institute for educators with instruction on how to integrate environmental education into the classroom curriculum. Educators participate in hands-on activities in the classroom and in the outdoors, group discussions and reading assignments. Academic credit is provided for completing this course of study.  
(20 teachers and informal educators)
- Our Summer Camps provide a week long fun, learning experience in the outdoors for 128 children.

## **Current Personnel**

KIDS for the BAY currently employs seven professional staff and one part-time office assistant paid on an hourly basis. Staff includes:

### **Mandi Billinge, Executive Director and Founder**

Executive Director Mandi Billinge founded KIDS for the BAY and has directed program development and organization expansion for the past sixteen years. Mandi has a BS Honors Degree in Biology from England, specializing in freshwater and estuarine ecology, a Teaching

Credential from Leeds University, England and the Development Director's Certificate from the University Of San Francisco.

**Sheela Shankar, Associate Director**

Associate Director Sheela Shankar has a Master's Degree in Education from CSU East Bay, specializing in environmental science education, and a Bachelor's Degree in Environmental Studies. Sheela is in her eighth year with KIDS for the BAY and is responsible for personnel, programs, curricula, managing program and staff evaluations, fundraising and government contract management, and assisting in organizational and program development.

**Shefali Shah, Education Director**

Education Director Shefali Shah has a Bilingual Teaching Credential and a Master's Degree in Teaching Critical Environmental and Global Literacy from New College, California. Shefali is in her ninth year with KIDS for the BAY and manages our Staff Development and Summer Academy for Educators Programs and teaches all KftB programs. She also translates our educational materials into Spanish.

**Sayo Costantino, Program Director**

Program Director Sayo Costantino is a native of the East Bay and has a Bachelor's Degree in Environmental Studies from UC Santa Barbara. Sayo worked with the United States Forest Service as a Conservation Education Coordinator before joining us at KftB. She is now in her third year here. Sayo is responsible for teaching our programs and for managing our Urban Wilderness Classroom program.

**Krista Mendelsohn, Program Director**

Program Director Krista Mendelsohn has a Master's Degree in Biological Science Education from San Diego State University, and a Bachelor's Degree in Biology from UC San Diego. She grew up in the East Bay, and returned here after eight years in the San Diego science and environmental education community. Krista is responsible for managing Watershed Action Program and for teaching KftB programs.

**Jonah Landor-Yamagata, Program Coordinator**

Program Coordinator Jonah Landor-Yamagata is a native of the East Bay and has a Bachelor's Degree in Environmental Studies with a focus on Agroecology and Community from UC Santa Cruz. Jonah worked in school garden programs in Berkeley elementary schools before joining KftB in September 2007. Jonah is Spanish bilingual and is responsible for coordinating and teaching KftB programs.

**Deborah Zierten, Program Coordinator**

Program Coordinator Deborah Zierten is an East Bay native and has a Master's Degree in Environmental Education from Southern Oregon University. Deborah is Spanish bilingual and became interested in environmental education and environmental justice issues through living and working in the rainforests in Ecuador. Deborah is responsible for coordinating and teaching KftB programs.

**Patrick Stelmach, Office Assistant**

Office Assistant Patrick Stelmach is pursuing an undergraduate dual degree in Political Science and Society and Environment from UC Berkeley. He plans to be an environmental lawyer. Patrick is responsible for helping to maintain a productive and efficient office environment.

**Advisory Board**

The Advisory Board includes:

**Leilani Alo**, President, Program Officer, Goldman Environmental Prize

**Ilana Kaufman**, Director of Windrush School

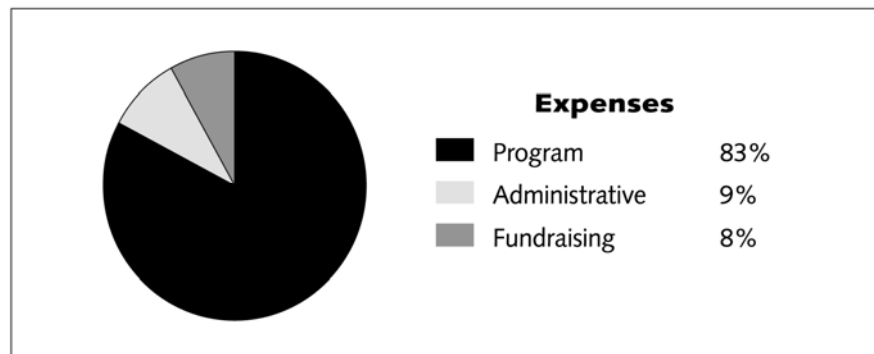
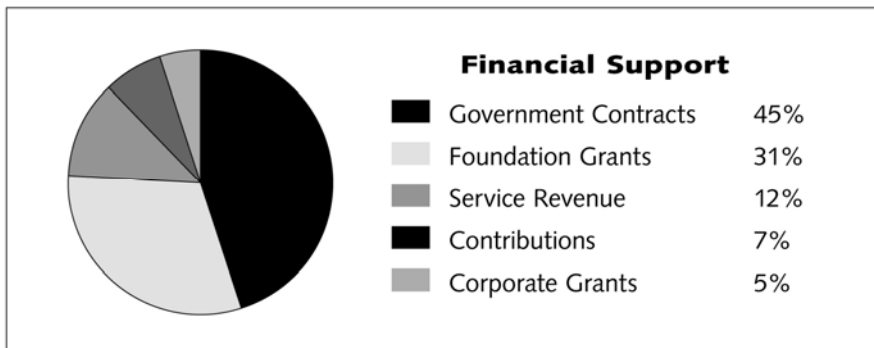
**Laura Prival**, Science Teacher, Oakland Unified School District

**Sumana Rao**, Business Owner, Napoleon at Home

**Brenda Salgado**, Program Officer, Breast Cancer Action

**Financial Information**

Current Average Annual Budget: \$600,000



## **SUMMARY OF S.W.O.T. ANALYSIS**

### **Conducted with the KftB Leadership Committee and Staff in 2008**

#### Strengths

- staff professional development program and opportunities for professional development within KftB
- KftB program model: in-depth, hands-on support for teachers, focus on environmental action, effective, measurable impact of programs
- attention to detail within KftB: depth and detail in organizational structure, program evaluations, organizational systems in place
- efficient use of resources
- expertise of staff, staff retention, personal work enjoyment, excellent health and vacation benefits, great organizational culture, staff feel valued, committed, passionate staff and Leadership Committee members
- legacy of KftB: sixteen year history of delivering excellent programs
- strong leadership
- strong relationships with teachers, school, funders and donors
- commitment to diversity
- small, flexible organization
- Earth Island Institute as a fiscal sponsor: being a project of Earth Island Institute simplifies our operations in terms of taking care of insurance, payroll and payroll taxes, tax auditing, health benefits, 501(c)(3) status, official governing board. It also helps with cash flow for an organization heavily dependent on government funding

#### Weaknesses

- not enough unrestricted funding, especially funding from individual donors, mainly have year to year funding rather than sustainable funding, need to develop the fundraising capacity of the Leadership Committee
- not enough visibility and need to increase the visibility of our “brand”
- limited technology and technical support

- inefficient accounting procedures: rely too much on Earth Island accounting which has a time lapse
- too much driving to schools for program staff
- need funding for internal professional development
- more comprehensive website needed
- Earth Island Institute as a fiscal sponsor: harder to develop our own identity, cannot develop our own governing board

### Opportunities

- current trends:
  - (1) greening trend of schools and homes: “saving the environment” is a current trend and part of popular culture
  - (2) state-wide mandate: education and environment initiative
  - (3) national movement: No Child Left Inside and concerns about Nature Deficit Disorder
  - (4) failure of the school system to deliver effective science and environmental education
- Bay Area residents are very environmentally friendly: there are many wealthy and concerned residents
- develop more fee-for-service programs and individual donations to increase unrestricted income
- expand programs regionally, for example in San Francisco, the South Bay, San Jose
- opportunity to develop new programs to address current trends and funding sources
- develop funding from ethical corporations
- increase visibility and promote our “brand”
- become our own 501(c)(3):
  - (1) some new funding opportunities could open up – workplace giving, certain corporations
  - (2) develop our own governing board with legal and fiscal responsibility – more participation in fundraising, education on budgeting and importance of unrestricted income
  - (3) possible growth opportunities

## Threats

- school administration that does not value science and environmental education, pressures on teachers to teach to tests required for No Child Left Behind Program
- the downward trend in the economy which means that there is reduced funding available for nonprofit organizations
- environmental disasters that prevent KftB from teaching our outdoor programs, for example the Cosco Busan oil spill in 2007
- a heightened interest in global warming that is reducing the funding available for watershed programs
- competition in the San Francisco Bay Area for funding because there are so many environmental and environmental education organizations in this area
- it is hard to develop major donors because the vision of our programs is less tangible than bricks and mortar
- KftB has reached the capacity of programs we can provide with local funding in our current region of Alameda and Contra Costa counties
- absorbing the cost of becoming our own 501(c)(3)

## **Discussion on 501(c)(3) Status of KftB**

A detailed discussion of the status of KftB as a project of Earth Island Institute (EII) and the idea of becoming our own 501(c)(3) arose out of the S.W.O.T. Analysis exercise with the Leadership Committee. The following is a summary of the outcome of that discussion:

Now in our sixteenth year of operation, KftB is an organization in its own right. We have received three national awards for excellence and several local awards as well. We have sustained steady growth over the past sixteen years and have many systems in place that ensure the smooth operation of a healthy organization.

A key question that has arisen from discussions in our strategic planning process involves our 501(c)(3) status. Is being a “project of Earth Island Institute” holding KftB back in any way?

The drawbacks of being a project of EII include the following:

- Several smaller funding sources, for example a few corporations and workplace giving, are not available to us because we have a fiscal agent.

- We cannot have our own fully functional board, which is legally and fiscally responsible for KftB while we have a fiscal agent.

The advantages of being a project of EII include:

- Being a project of EII simplifies our operations in terms of taking care of insurance, payroll and payroll taxes, tax auditing, health benefits, 501(c)(3) status and official governing board. All of these functions would have to be managed internally if we were not a project of Earth Island.
- EII ensures our cash flow as we wait for payments from government contracts.

After discussing these advantages and drawbacks the Leadership Committee agreed that being a project of EII was beneficial to KftB because it is an efficient and cost effective arrangement that enables KftB to focus more resources on fulfilling the mission and to focus fewer resources on administration.

## **PROGRAM EVALUATION**

KftB completed a detailed Evaluation Report for our three major programs for the 2006 – 2007 school year. To read these reports on the Watershed Action Program, Storm Drain Rangers Program and Four Rs Action Program, please visit our website at [www.kidsforthebay.org](http://www.kidsforthebay.org).

# **KIDS for the BAY**

## **STRATEGIC PLAN 2009**

### **Core Strategies**

#### **Optimize the efficiency of all KIDS for the BAY operations.**

##### **Background**

There is a pressing need to ensure organizational and especially fiscal stability and a need to increase cash flow. This is particularly true in the current challenging economic climate. In order to achieve this we will need to increase service revenue, individual donations, foundation and corporate funding and to increase the efficiency of our government invoicing process. We will need to assess the administrative staff needs of the organization and ensure the maximum efficiency of our administrative staff plan with the resources available.

The KIDS for the BAY (KftB) East Bay office will serve as a model for the development of future regional offices. There is a need to ensure the maximum efficiency of the East Bay operation so that it can be an effective model. Through the strategic planning process we have identified the programs we will focus our resources on over the next three to five years. There is a need to ensure that all projected expenses for these programs are in-line with actual costs and that these programs are most efficiently staffed to ensure the highest quality and the maximum return on funders' investments. KftB must develop an optimal organizational staffing plan, program portfolio and budget for the East Bay operation, which can serve as an effective model for the development of new, regional operations.

#### **Develop a Governance Strategy for KIDS for the BAY**

##### **Background**

As a project of Earth Island Institute (EII) the EII Board of Directors is legally and fiscally responsible for KftB. Therefore, KftB does not require an official Board of Directors. KftB has managed an Advisory Board (Leadership Committee) for the past eight years, which has advised on and assisted with important leadership issues over the years. These have included developing a mission statement, logo, brand recognition, look and feel for the organization, assisting with fundraising and, most recently, helping to guide the strategic planning process. As a result of discussions in strategic planning the need to more clearly define the role of the Leadership Committee and to determine how it can be most helpful to the organization has arisen as a high priority.

## **Increase the Visibility of KIDS for the BAY**

### **Background**

KftB is well known in the field of environmental education and is the recipient of three national and several local awards that recognize our best practices in the field. We are well known and well represented in local and regional environmental education networks. However, our work and our organization are not well known to the general public. There is a need to increase our visibility in the San Francisco Bay Area to appeal to individual donors and potential new funders and clients.

## **Expand our programs by expanding our operations on a regional basis.**

### **Background**

KftB programs have a local, place based focus. Therefore our funding base is very local. In order to expand our programs, there is a need to expand to new regions to maintain the local, place based focus of our work and to attract local funding sources. Possible new target regions include: San Mateo County, San Francisco, the North Bay, Silicon Valley, the Peninsula. We often receive inquiries from potential clients for our services from all of these areas. The need for our programs seems to be as strong in these regions as it is here in the East Bay. There is a need to assess potential funding and fee-for-service income available in these new regions and expand our services as appropriate.

# **KIDS for the BAY**

## **STRATEGIC PLAN 2009**

### **Program Goals**

#### **School Based Programs**

##### **Watershed Education Programs**

This includes our Watershed Action, School Wide Watershed Action, Storm Drain Rangers, Classroom Presentations, Creek and Bay Field Trips, Wildcat Creek Clean Up and Estuary Action Programs.

##### **Combined Goal for all Watershed Education Programs:**

- 3,780 students each school year increase their scientific understanding of their local watershed and the San Francisco Bay Estuary ecosystem

##### **Additional Goals for Watershed Action, School Wide Watershed Action and Storm Drain Rangers Programs:**

- 1,800 students each school year become stewards of their local environment and take action to improve the health of their local watershed
- 60 teachers each school year increase their confidence in teaching science using the local watershed environment as an educational resource
- Watershed Education Programs are integrated into the curriculum and culture of target schools and engage the school principal, grade level teams of teachers, students, parents, other family members and local environmental organizations.

#### **Four Rs Action Program**

##### **Goals:**

- 192 students each school year increase their scientific understanding of the Four Rs (reduce, reuse, recycle and rot) and how their personal behaviors affect the waste stream
- 192 students each school year change their behavior to practice the Four Rs daily and reduce the waste stream from their schools and homes
- 6 teachers each school year increase their confidence in teaching about the Four Rs and environmentally friendly behavior changes

- The Four Rs Action Program is integrated into the curriculum and culture of target schools, engaging the school principal, grade level teams of teachers, students, parents and other family members.

## **Community and Family Programs**

### **Aquatic Science Adventure Summer Camp**

#### **Goals:**

- 192 children each summer increase their scientific understanding of a variety of local aquatic ecosystems
- 192 children each summer increase their love of nature and activities in the outdoors

### **Environmental Science Workshops**

#### **Goals:**

- 20 community or family groups each year increase their love for and understanding of science and ecology.

## **Summer Academy for Educators**

#### **Goals:**

- 40 teachers each summer increase their confidence in using the local environment as an educational resource to stimulate students' learning and empower students to become environmental stewards.
- 1,200 students become stewards of their local environment and take action to address environmental health issues.
- KftB programs are integrated into the curricula and culture of target schools involving principals, teachers, students and their families.

# **KIDS for the BAY**

## **STRATEGIC PLAN 2009**

### **Administrative, Financial and Governance Goals, Objectives and Long-Term Priorities**

#### **Administrative Goals**

##### **1) Staffing and Benefits**

**Goal:** Increase the effectiveness of our staffing plan to increase efficiency in operations, program delivery and budgeting.

**Priority:** Clearly identify administrative staff needs and where appropriate integrate their compensation into requests for program funding.

**Priority:** Clearly identify program staff positions, responsibilities, compensation and benefit packages that meet the current needs of KftB.

**Priority:** Closely match program staff required to deliver programs with funding available each school year.

**Goal:** Increase the quality of the career development experience for all KftB staff.

**Priority:** Hire staff with potential to develop new skills and experience to fulfill job requirements at KIDS for the BAY as a career development opportunity.

**Priority:** Provide high quality internal and facilitate external professional development opportunities for staff.

##### **2) Marketing/Public Relations**

**Goal:** Increase the visibility of KIDS for the BAY in the San Francisco Bay Area.

**Priority:** Define our marketing/public relations goals and objectives.

**Priority:** Define our marketing/public relations strategies to meet these goals and objectives.

**Priority:** Clearly define our outreach program goals and set a clear plan for how we will meet these goals each year.

**Priority:** Conduct at least one high profile fundraising/marketing event for KftB each year.

Priority: Create a clearly defined plan to nominate KftB for local, regional and national awards each year.

Priority: Ensure KftB is featured in at least two articles in major local newspapers or magazines each year.

Priority: Forward press releases about the work of KftB to local publications at least twice each year.

### 3) Infrastructure

#### FACILITIES

**Goal: Improve the match between our facilities (office space and equipment storage space) and our organizational needs.**

Priority: Clearly define the facilities needs of KftB in our East Bay location for the next three to five years and if needed identify a more desirable facility and location that more closely meets our needs.

Priority: Identify suitable office space in targeted areas as regional expansion progresses.

#### TECHNOLOGY

**Goal: Improve our technology and communication systems so that they more closely meet the needs of the staff and the organization.**

Priority: Identify and use the best technologies and systems available to ensure that information is safe and secure at all times.

Priority: Identify and utilize the most up-to-date, cost-effective hardware and software to maximize the efficiency of KftB operations.

Priority: Establish an efficient and cost-effective technical assistance and repair system.

#### MANAGEMENT INFORMATION SYSTEMS

**Goal: Improve the current information management system for fundraising files, both hard copy and electronic versions.**

Priority: Organize and update the filing systems for fundraising files, both hard copy and electronic versions.

#### **4) Planning, Evaluation and Quality Control**

**Goal:**            **Increase the effectiveness of strategic planning for KftB.**

Priority:           Create a Strategic Planning Cycle so that KftB is constantly in the process of developing and implementing a strategic plan.

**Goal:**            **Increase the effectiveness of program evaluation as a formal, ongoing process within KftB.**

Priority:           Create a program evaluation timeline for the next five to ten years that makes realistic use of the resources we have available for this activity and the data we will generate.

## **Financial Goals**

### **1) Resource Development**

**Goal:**           **Increase our unrestricted income every year by at least 4% of our annual budget.**

Objective:       Increase our program fee-for-service income every year by at least 20%.

Objective:       Increase our individual donations every year by at least 20%.

Objective:       Increase funding from ethical corporations.

**Goal:**           **Increase the scope of KftB operations and services by expanding our organization to new regions within the San Francisco Bay Area.**

Priority:          Assess the potential funding available to expand our programs into new regions, including the potential to develop program fee-for-service unrestricted income as a funding base for all future expansions.

### **2) Financial Management Systems**

**Goal:**           **Increase KftB cash flow and maintain at least a three-month reserve of cash.**

Priority:          Ensure that our annual expenses are at least 5% less than our projected annual income.

Priority:          Develop new program budgets that more closely reflect all our expenses for conducting our programs, including overhead and shared expenses.

**Goal:**           **Increase the effectiveness of KftB financial management systems.**

Priority:          Review annual and quarterly financial statements and budgets with a financial officer on the Leadership Committee.

Priority:          Improve the internal monthly accounting system to bring it in-line with Earth Island's and specific funder's needs.

## **Governance Goals**

**Goal:**           **Increase the effectiveness of the Advisory Board in helping KftB to meet its current goals and fulfill its mission.**

Priority:          Define the governance strategy of KftB.

Priority:          Define the most effective composition and roles needed for the Advisory Board.

Priority:          Increase the effectiveness of the education, support and recognition systems provided for Advisory Board members.

# KIDS for the BAY

## STRATEGIC PLAN 2009: Appendix

### Program Portfolio for KIDS for the BAY East Bay Office

Program	Current level of activity	Proposed growth strategy	Projected future level of activity
Watershed Action Program (WAP)	36 programs per school year	maintain	36 programs per school year, or 20 – 30 programs if we introduce the new School Wide WAP.
Summer Academy	1 week per summer	expand	2 weeks per summer
Classroom Presentations (CP)	20 programs per school year	maintain	20 programs per school year
Field Trips (FT)	20 programs per school year	maintain	20 programs per school year
Wildcat Creek Clean Up	1 project per school year	maintain	1 project per school year
School Wide WAP	Proposed new program	develop new program	1 target school for each three year program
CP/FT/action project package	Proposed new program	develop new program	16 – 20 programs per school year
Environmental Science Workshops	4 per year	expand	20 – 30 per year
Aquatic Science Adventure Camp	6 weeks per summer	expand	12 - 14 weeks per summer
Mini Beast Summer Camp	2 weeks per summer	eliminate	eliminate
Storm Drain Rangers	20 programs per school year	maintain with adjusted contract	20 programs per school year
Four Rs	24 programs per school year	decrease	5 - 8 programs per school year
Urban Wilderness Classroom	1 target school for a three year program	eliminate when current program ends	0
Educators Trainings	4 per year	maintain	4 per year

**Total number of teachers = 200 per school year**

**Total number of students = 4,000 per school year**