



Seaside Sustainability

Strategic Plan: Goals, Objectives, Strategies, Tasks

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Goals: Where you want to be

Objectives: The direction and the major things you have to accomplish to take to get there

Strategies: What you have to do to get there for each objective

Tasks: The key, specific actions required

BOARD & GOVERNANCE

Goal

To build a board with the capacity and understanding of best practice in non-profit governance necessary to achieve sustainability and fulfillment of the mission.

Rationale

The Seaside Board has suffered from a severe lack of capacity with a limited number stretched thin; the demands of significant internal administrative work limiting the time for the vital engagement in building the assets for sustainability; reputation and financial capital, outreach and network development, and governance.

Objective 1

Strengthen and stabilize board leadership and membership to achieve the best balance of special skills, network connections, philanthropic capacity and will.

Strategies

- Define and prioritize Board needs
- Define process and timeline for Board development (review, transition, recruitment)
- Develop **Advisory Board** to expand, enrich, and formalize network of advisors and pool of potential future board members

Tasks

- Create & staff: **Board Development Committee**
- Complete **Board Recruitment Matrix**; Identifying the skills and capacities needed particularly during this Strategic Plan
- Define process for board and board member review and new member consideration (*Board Development Committee*)
- Define & implement **Board Transition & Recruitment Plan**
- Define process and timeline for board turnover, transition, and recognition
- Develop **Advisory Board**: providing opportunities to engage and vet potential new board members - and maintain engagement and support of former board members.

Objective 2

Develop high functioning action-oriented, self-perpetuating board with deep understanding of best practice in non-profit governance by clarifying board roles, responsibilities, expectations and terms.

Strategies

- Further define and codify board roles and responsibilities, officers, committees, and meeting and decision-making protocols in *[Seaside Board Handbook](#)*.
- Onboard all new board members with a comprehensive **Board Orientation** (introduction and review of *Seaside Board Handbook*) and mentor/mentee engagement.
- Develop specific annual goals for the board and any board committees.
- Formalize *Board Annual Review* of achievement of defined goals as well as individual member self-assessments (attendance at meetings, committee work, ambassadorship, philanthropic engagement, etc).
- On-going training, development and mentoring of board members in areas including: financial oversight; governance best practices; diversity; culture building (diversity, equity, inclusion and belonging)

Tasks

- Gather examples of other non-profit board handbooks and bylaws
- Review and update Board Documents
- Review update and approve bylaws
- Draft, approve, and implement: *Seaside Sustainability Board Handbook* practices
- Define & collate **Board Orientation Packet**
- Plan, schedule, deliver annual **Board Orientation** for new members
- Draft & agree annual *Board Annual SMART Goals*
- **Define and implement Board Annual Review Process**
 - Define and write *Board Annual Review Survey* tool (survey)
 - Schedule and conduct **Board Annual Review**
- Plan on-going Board development (Essex Institute, Guest speakers)

MANAGEMENT & OPERATIONS

Goal

Develop the financial resources to secure the paid, professional leadership and staffing necessary to support Seaside Sustainabilities continuing growth as we deepen our impact and expand our engagement locally and around the world. Funding the expertise and continuity of executive leadership and operational management is a strategic imperative for developing an organization capable of sustainable growth.

Rationale

As with many start-up and still-small non-profits, Seaside Sustainability has depended on the commitment and skills of board members, an unpaid Executive Director, and unpaid internship managers, and advisors to meet the expanding operational needs of the organization. needs to secure the funding resourcing of management and operations must keep pace with Seaside's continuing growth and reach.

Objective 1

Continue to support Executive leadership that is highly focused, effective, and sustainable.

Strategies

- A clearly defined executive director job description and annual performance goals aligned to this strategic plan, that are specific, measurable, achievable, relevant, and time-bound (SMART), agreed to by both the board and the executive director, and used in regular performance reviews.
- Appropriately resource the Executive Director (time, personnel, funding) to achieve the goals agreed.
- Regular review/feedback to ensure best support, accountability, and on-going growth.

Tasks

- Executive Director salary - secure funding for full-time, paid Executive Director)
- *Executive Director Job Description* - write and approve
- *Executive Director Annual Goals* - write and agree: prioritized specific areas of focus and SMART goals and timeline.
- Design and agree *Executive Director Annual Review* (process, tool, timeline)
- Approve & implement comprehensive *Management & Staff Recruitment Plan*: Identifying the key leadership positions (skills and experience) and strategies for obtaining them through additional funding, partnership development, long-term volunteer commitment. Such as:
 - Chief Financial Officer
 - Director of Advancement & Development
 - Director of Grants & Grant Writing
 - Director & Coordinator of Interns & Volunteers

Objective 2

Expand and strengthen the unpaid volunteers who are an integral and essential part of Seaside's management and operations, filling any gaps in paid non-profit management and operations staffing.

Strategies

- Expand **Seaside Internship Program & Management Fellowship Program** recognizing that beyond the engagement and impact of interns around the world, the intern managers and fellows have become integral and essential to daily operations.
- Develop **Seaside Volunteers Corps** to attract retired professionals with key skills and experience.
- Increase the continuity/longevity of intern managers and interns by securing funding to pay them a stipend.
- Capitalize on the vast number of universities and colleges in New England, recruiting interns and management fellows.
- Capitalize on the talented retired folks on the North Shore who have key skills and passion for environmental work.

Tasks

- Define job descriptions for all administrative roles and functions that cannot currently be filled by paid professionals
- Identify all administrative roles and functions that could be effectively filled by Intern Managers, interns, and/or volunteers
- Identify the roles and functions that would be particularly beneficial experiences for undergraduate and graduate students and draft internship description including application process, program requirements, and oversight.
- Design and implement comprehensive **Internship Recruitment Plan** with specific and measurable goals and objectives
- Set targets for:
- Design and implement a **Seaside Volunteer Corps Recruitment Plan**
 - Appointment of Director of Seaside Volunteer Corps
 - Job descriptions for all roles & functions
 - Application & review process
- Set targets for:
 - #/% increase in Internships (applications, completed, hours of service)
 - #/% of universities/schools granting internship credits
 - #/% of interns who rate the experience & support highly
 - #/% of interns who continue on to become Intern Managers.

FINANCIAL MANAGEMENT

Goal

Strengthen and enhance the financial office leadership, strategic planning, operations, and accountability to best ensure Seaside's long-term financial sustainability.

Rationale

Achieving financial stability is critical. Seaside must develop consistent funding and funding sources that provide the revenue necessary to support program and operations.

Equally, operations have to be supported with clearly defined financial practices for budget development and approval, financial reporting and accountability. The successful financial management of non-profits particularly requires careful, strategic planning and effective management and execution.

Objective 1

Organization-wide understanding of Seaside financial practices and policies.

Strategies

- **Codify, approve, and implement** *Seaside Finance Office - Policies & Procedures* to include:
 - Procedure for Annual Budget development, approval , and tracking.
 - Procedure for spending (clarifying when/if any expenditure may require two signatories).
 - Procedure for processing and tracking gifts and grants

Tasks

- Collect Financial Office Policies & Procedures (examples from other non-profits)
- Review current financial policies and accounting procedures - update: *Seaside Finance Office- Policies & Procedures*
- Write & approve *Seaside Finance Office- Policies & Procedures*
- Define internal report formats(data required -budget to actuals, variance, etc), frequency, and person responsible

FINANCE - continued

Objective 2

Clarify reports and data required by the financial office

Strategies

- Proposed budget must be backed-up with historic data supporting/realistic projections for revenue (gift, grant, and fee/program income) as well as expenses.
- Add % columns to reports. For example, each revenue stream row (Donations, Events, etc.) would show a total dollar amount and then the % of total income it represents.

Tasks

Define reports & historic data needed such as:

- ***Development Report***
 - Grant Management
 - Grant type: one year, multi-year, Renewable?
 - Expiration date
 - Use - (restricted to)
 - Expense
 - Total available/budgeted annually % of total budget and % of total income.
 - Donor Income:
 - Pledges: total#, \$ in, \$ outstanding
 - Type of pledge/gift (one year, multi-year)
- ***Program (P&L) Report***
 - Fee income & expense
 - Engagement # (volunteers, interns, public, etc)

Objective 3

Secure the professional financial management

Strategies

- Secure experienced Business Manager/CFO
- Secure someone to serve as bookkeeper
- Make financial management skills/experience a priority for Board membership development

Tasks

- Write ***Volunteer Business Manager*** and ***Volunteer Bookkeeper*** job descriptions
- Post for Volunteer Business Manager and Volunteer Bookkeeper
- Identify a target salary amount for fundraising and budget development
- Make financial management and fundraising experience a priority for Board member recruitment.

ADVANCEMENT & DEVELOPMENT

Goal

Build Advancement operation (team, and organization-wide culture) with the capacity and skills necessary for maximizing the impact and return of every resource investment, particularly the fundraising and friendraising essential for financial stability and achievement of the Seaside Mission.

Rationale

Seaside is largely dependent on grant and donor income. With extremely limited resources (money, time, people) the operation must have a laser focus on tracking and cementing relationships with primary stakeholders while identifying and developing new sources of donor and grant income. To do this successfully requires commitment of the necessary resources and development of a philanthropic ambassador culture that starts with the board.

Objective 1

Ensure Seaside has the resources (technology, applications, personnel, budget, board support) necessary to build and maintain the friend and fund raising relationships required for long-term sustainability.

Strategies

- Define **Annual Development Plan & Master Event Calendar** to ensure a consistent flow of friend and fund raising events and optimize participation through early planning.
- Expand board engagement and participation. Non-profit boards must lead the charge, modeling philanthropic support of the organization and its mission.
- Plan local and regional events, alone and/or in partnership, suited to particular audiences of stakeholders, such as educators, scientists, city planners, civic groups, fishing and marine tourism industry groups, etc

Tasks

- Write **Annual Development Plan & Master Event Calendar**:
- Review grant & gift revenue goals for 2023 and identify the resources needed (events, foundation/grant research, grant writing).
- **Advancement & Development Recruitment Plan**:
 - Identify personnel (paid & volunteer) needed to achieve the plan.
 - Prioritize recruitment and funding (Development Director, Grants Director)
- **Board Pledge of Service** - ensure pledge defines expectations regarding development engagement and participation in fundraising and friend-raising (due to diverse donor capacity – rather than asking for a specific amount, many ask all members to participate and to make the organization their philanthropic priority during their years of service.)

Objective 2

Align and synchronize Program and Development commitments and operations for maximum impact.

Strategies

- Define advancement decision-making process that gets the right people to the table to ensure the various perspectives of program, finance, development, marketing and communications, are represented.

Tasks

- Create **Advancement Committee**: Define membership and meeting time.

Objective 3

Continue to improve the consistently successful local events for raising revenue and use them as a model for expanding reach and participation beyond Cape Ann.

Strategies

- Continue to ask for feedback and perform internal reviews following events so we are always improving
- Refine *Sip for the Sea*, *Giving Tuesday*, and *Annual Fund*.
- Explore potential for shared events with like-minded organizations to expand network and potentially expand both participation and donors.
- Explore other new events that we can host local - world wide (web-based).

Objective 4

Greatly expand the 'community' that is Seaside's greatest strength.

Strategies

- Prioritize outreach to grow: partnerships, inquiries, followers, volunteers, alums, alum families, past board members, civic organizations, etc.
- Increase focus and attention to corporate donors (partners and sponsors)
- Develop and promote our Key Performance Indicators (KPI's) and meaningful Impact Metrics

EDUCATION & PROGRAM

Goal

Strategically refine and expand Seaside's programs and engagements so that all are positioned for the greatest impact in achieving the mission and the immediate goals of this strategic plan; sustainably expanding Seaside's reach and engagement locally, nationally and around the world.

Rationale

For Seaside to achieve its mission, "*to preserve and protect the world's oceans, seas, wetlands, and estuaries by motivating citizens to evaluate the critical issues facing the water environment, educating the public on best practices for sustainability, and providing guidance for taking effective action*", requires a balance of local, national, and international engagement. It also requires that every expenditure of resources, time, people, funding, produces the greatest possible value and return and is feasible, with the resources and support available or realistically attainable.

Objective 1

Ensure that the Seaside's program choices, are mission compatible (action oriented), have the greatest investment/return ratio, and are highly feasible to achieve within the proposed timeframe with the resources (funding and personnel) available or realistically attainable.

Strategies

- Laser focus program development and implementation by defining a formal process for vetting, approving, and regularly reviewing the successful impacts of all educational programs (in-place and virtual), with specific, data-driven measures of success for each program that align to the mission and strategic plan goals
- Strategic development of synergistic partnerships for maximum value and impact; engaging partners with the greatest potential to significantly improve program, network, funding source development and volunteer engagement.
- Create and Advancement Committee to integrate decision-making and planning with Finance, Development, Marketing and the Board to achieve synergistic development.

Tasks

- Complete comprehensive *Seaside Program Review**
 - Define process and metric for existing and new program review (engagement/outreach, funding, personnel required, etc.)
 - Complete metric for each existing and proposed new programs
 - Budget for each project
 - Prioritize program development and implementation based on greatest investment/return (greatest impact feasible to achieve within the proposed

timeframe with the resources (funding and personnel) available or realistically attainable

- Develop 3 year *Seaside Program Master Plan**: Master calendar for program development and implementation, identifying key dates for:
 - Project planning/development (including partnership/community engagement)
 - Acquisition of any additional equipment
 - Acquisition of Personnel (paid staff, interns, volunteers)
 - Budget income and expense (timed goals tying acquisition of key resources (personnel & equipment) with achievement of donor and grant income required.

* The Advancement Team should be involved in both the *Seaside Program Review* and development of the 3 year *Seaside Program Master Plan*

Objective 2

Continue to support the highest level of Education Program leadership; ensuring the on-going creative development, successful management and implementation of all projects.

Strategies

- Support the Executive Director with the greatest time to do the most important tasks.
- Identify and prioritize additional support and positions needed, such as: Field Project Director and Volunteer Coordinator.

Tasks

- Comprehensive review of program leadership and management needs
- *Executive Director Annual Goals*: Review and agree focus and prioritization of Executive Director engagement, setting realistic parameters and timeframes (SMART goals).
- Identify and prioritize (timeline) additional paid and volunteer staff needed (such as **Field Project Director** and **Volunteer Coordinator**) and the grant and donor funding required.

Objective 3

Significantly expand Seaside's reach, reputation capital, funding base and revenue streams, partnerships and stakeholder networks through strategic expansion of virtual educational programs, partnerships and events.

Strategies

- Develop *Seaside Virtual Learning Plan*
 - Identify and develop virtual programs with the greatest potential to expand grant and fee income, and reach.
- Deploy current interns and internship program alumni as educational volunteers and Seaside Sustainability ambassadors to create a network with global reach

among colleges and universities, sustainability non-profits, NGOs, government agencies and other key sustainability education stakeholders

- Develop *Internship Program Master Plan*. The Internship Program plays a critical role in terms of global reach, network development (particularly to universities and other environmental and political organizations), and as an unparalleled source of highly educated, committed and effective staff and volunteers.

Tasks

- Develop *Seaside Virtual Learning Plan* (3 year plan with SMART goals (dates, leadership and staff identified)
- Develop *Internship Program Master Plan*
 - Comprehensive review of program (SWOT analysis)
 - Prioritization of Internship Program development
 - Identify 3-year SMART goals: geographic area(s) of focus, resources required (personnel, partnerships, funding*, technology).
 - * Including funding for Intern Managers to reduce turn-over and increase continuity

Objective 4

Strengthen and expand our Greater Cape Ann educational programs, partnerships, volunteers, and funding support. Our local presence is essential for keeping our networks of local volunteers and financial supporters committed and allows us to demonstrate the local and global interplay of the issues facing water-based ecosystems.

Strategies

- Prioritize the delivery of local and regional educational programs with the greatest potential for increasing multi-generational participation of volunteers, partners, foundations, and individual donors.
- Identify and develop local partnerships with the potential to increase engagement, reputation capital, and impact through shared projects.
- Prioritize the development and delivery of special events with the greatest potential for increasing multi-generational participation of volunteers, partners, foundations, and individual donors.

Tasks

- Ensure *Seaside Program Review* includes a SWOT analysis specific to North Shore programming, partnerships, volunteer engagement, and fundraising support.
- Ensure *Seaside Program Master Plan* defines SMART goals that address the program review results identifying:
 - Programs for delivery
 - Specific leadership for development and delivery (who is responsible)
 - Funding (grant & donor needed)

MARKETING & COMMUNICATIONS

Goal

Build a highly effective marketing and communications operation that will maximize Seaside's impact and support at all levels; providing consistent, up-to-date messaging across all media platforms and technologies about our mission, accomplishments, plans, and calls to action.

Rationale

The Marketing and Communications Team is responsible for developing all internal and external marketing communication infrastructure and messaging. This generally includes, but is not limited to, the organizations website, social media presence, digital and print advertising, direct email and database communications, and PR. This work is essential to all non-profits; defining the 'dream' for all constituents and telling the story of what is and will be done and how people can be involved, builds and protects reputation and relationship capital and commitment.

Objective 1

Build a **Marketing and Communications Team** with the skills, resources, and authority to both define and tell the story and 'get the word out' for the greatest impact.

Strategies

- Identify personnel (skills, experience) needed and funding requirements
- Expand training and engagement of worldwide network of current interns and internship alumni to increase our social media presence, reach, and engagement.
- Develop and implement a hiring and recruitment plan. (Identify the specific skills and levels of experience required for the Marketing and Communications Team to succeed, clearly defining areas of responsibility and which jobs require paid professionals and which jobs are suitable for experienced interns and/or volunteers)
- Identify budget needs: any technology (hardware and software) and funding required.
- Develop **Advancement Committee** and ensure that the lead person for Marketing and Communications Team is at all committee meetings. Engaging leadership (Executive Director, Development, Program, Finance) in this specific work to ensure timely identification of upcoming projects and events to allow for planning and agreement on resources needed for successful execution.

Tasks

- Identify who will lead the development of the team and planning for marketing and communications.
- Develop *Marketing & Communications Strategic Development, Hiring and Recruitment Plan*
- Meet with Advancement Committee (ED, Finance, and Development, Program) to finalize resource needs and implementation timeline and approve plan.

Objective 2

Develop and implement comprehensive *Marketing and Communication Annual Plan* (SMART goals and implementation timeline).

Strategies

- Consistent, up-to-date messaging across all media platforms and technologies about our mission, accomplishments, plans, and calls to action, with a focus on engaging storytelling that empowers, educates, and inspires a wide range of stakeholders to get involved.
- Recognize that all stakeholders are ambassadors and ensure that they have up-to-date, accurate information about what Seaside is doing and how one can get involved
- Identify and implement specific plan/goals for how to maximize the engagement and impact of the Seaside Intern Program as part of the marketing and communications team.
- Expand web-based opportunities for interactive engagement.
- Supplement website and social media outreach with creative engagements/events to expand reach, reputation capital, and funding.
- Increase social media posts, followers, engagement rate, and annual op-eds and press releases in regional and national newspapers and web-based media platforms

Tasks

- **Write and implement: *Marketing and Communications Annual Plan***
 - With the Advancement Committee, prioritize marketing and communications team's work, identifying the key events, programs, news.
 - Define/Standardize key marketing & communications weekly requirements, (particularly for the website - in terms of calendar, program delivery, news) and person responsible.
 - Define key message (talking points and data: mission, accomplishments, plans, ways to get involved, intern program data) with Advancement Committee
 - Write *Wallet Reference Card*: key talking points and data (distribute to all board members, intern managers, interns, volunteers, etc)
 - Specify marketing and communications work/engagement of interns as ambassadors for Seaside.
 - Identify specific targets for
 - #/% increased followers & hits
 - #/% increased posts per week/month
 - #/% increase in press releases etc.