



Strategic Plan

FY23 – FY27

New Kensington Group
Fall, 2022

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Your Vision and Mission

Vision: *Sailing for All*

Mission: *Through sailing, we build a diverse community, promote personal growth, and inspire appreciation of the natural environment.*

Values

Value	Recommended Definition
Learning	Through sailing, we gain life skills and opportunities for self-discovery.
Volunteerism	Volunteerism is the foundation of our community built by generations of sailors teaching sailors.
Community	We value sailing for all, inspiring people to learn and share their love of sailing as an enriching experience, fostering personal growth and friendship.
Inclusivity	We strive to create a safe environment for all to participate equitably and attract a diverse community of members and staff that reflect greater Boston.
Fun	Our dock and the Charles River are a unique playground where we create opportunities to have fun and recognize the joy, spirit and thrill of sailing.
Excellence	We continually adapt and innovate best practices to be the model for all other community sailing programs.

Program



Program Goals

1. Attract first-time and retain current membership in order to introduce and perpetuate the joy of sailing.
2. Improve the quality of the sailing fleet to provide the best sailing programs possible and promote participation at maximum capacity, excellent sailing experiences and safety on all fronts.
3. Increase participation across a range of dimensions including race, ethnicity, socioeconomic status, gender, and ability.
4. Continue to develop innovative educational opportunities that relate to sailing across all CBI programs.

Goal #1: Attract first-time and retain current membership in order to introduce and perpetuate the joy of sailing.

Recommended Strategies:

- a. Maximize but not exceed capacity to ensure a high-quality experience for all sailors.
- b. Build broader awareness of Community Boating's role in the community and resource for all to enjoy.
- c. Continue to hold community events for members to foster the social benefits outside of sailing

Goal #2: Improve the quality of the sailing fleet to provide the best sailing programs possible and promote participation at maximum capacity, excellent sailing experiences and safety on all fronts.

Strategies to Pursue:

- a. Maintain (and/or replace) and keep up to date meeting safety standards for the fleet.
- b. Offer a fleet of boats that are versatile for the needs of the members and their skills.
- c. Identify long term storage solution for the boats and trailers
 - (1) 12-18 months from now need to address with buy or lease opportunity
 - (2) critical to address as capacity constraints are real
 - (3) maintenance facility for CBI at alternative location? What would it cost?
- d. Improve physical plant appearance of fleet and facility
 - (1) safety is priority one
 - (2) DCR responsibility / what does CBI want to do / incur expense?
 - (3) address roof leakage / install solar panels

1. Goal #3: Increase participation across a range of dimensions including race, ethnicity, socioeconomic status, gender, and ability.

Strategies to Pursue:

- a. Maintain existing partnerships as well as explore new affiliations with community-based organizations to bring CBI to a more diverse community of participants.
- b. Continue to promote sliding scale payment options to reduce financial barriers to participation.
- c. Increase staff diversity through the junior program instructor-in-training position in order to demonstrate a workforce that better mirrors a more diverse population we wish to serve.
 - (1) Pilot programs with community partners to develop broader IIT training program
- d. Hire extra staff as instructors to support rating growth.
- e. Perform data analysis to identify inequities in learning outcomes associated with race, ethnicity, gender, age etc. and to identify ways CBI can improve education, sailing opportunities or class offerings to address these inequities.
 - (1) Explore options to better capture demographic data
 - (2) Annually perform a member experience survey.
- f. Staff Training: engage external experts regarding best practices related to accessible sailing

Goal #4: Continue to develop innovative educational opportunities that relate to sailing across all CBI programs

Strategies to Pursue:

1. Continued innovation of learning in all programs (*adult, junior, UAP, etc.*), including online opportunities.
2. Continue to integrate innovative educational STEAM activities into all programs.
3. Utilize CBI's unique capabilities and resources to monitor Charles River water quality for the well being and education of our members and contribute to the body of knowledge of Cyanobacteria in the Charles River.

Goal #1: Attract first-time and retain current membership in order to introduce and perpetuate the joy of sailing.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Maximize but not exceed capacity to ensure a high-quality experience for all sailors.	FY23Q2	\$0	90% of fleet capacity utilized during peak times Monitor class size to not exceed capacity	Director of Sailing Programs
b. Build broader awareness of Community Boating's role in the community. <ul style="list-style-type: none"> • Brand CBI on all boat hulls and non-sponsor sails • Research new paid advertising opportunities • Engage marketing professionals to promote CBI - Marketing consultant firm hired to create XYZ • Create new promotional videos for each program - "Welcome to CBI" video 	FY23Q2	\$10K per year	20% year on year the fleet will be branded with CBI At least 1 new marketing initiative per year (i.e. advertising, etc.) Featured in print or visual media 3 times during the year	Community Relations Director
c. Continue to hold community events for members to foster the social benefits outside of sailing	Ongoing	\$0	12 Events per year. 5 Friday night socials after racing per year.	Community Relations Director

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Goal #2: Improve the quality of the sailing fleet to provide the best sailing programs possible and promote participation at maximum capacity, excellent sailing experiences and safety on all fronts.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
<p>a. Maintain (and/or replace) and keep up to date meeting safety standards for the fleet.</p> <ul style="list-style-type: none"> Develop a plan to modernize and replace our fleet <i>Annually maintain the fleet for use and appearance</i> Optimize our fleet through standardization 	Ongoing	\$0	<p>Outboard Engines will be no more than 2 years old</p> <p>Paint topsides of mercuries</p>	Director of fleet and Facility & Director of Sailing Programs
<p>b. Offer a fleet of boats that are versatile for the needs of the members and their skills.</p> <ul style="list-style-type: none"> Develop a fleet plan Annually review and analyze the utilization of the fleet 	FY23Q2	\$0	Develop Fleet plan by Jan 2023	All Program Directors

Goal #2: Improve the quality of the sailing fleet to provide the best sailing programs possible and promote participation at maximum capacity, excellent sailing experiences and safety on all fronts.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
<p>c. Identify long term storage solution for the boats and trailers (buy or lease)</p> <ul style="list-style-type: none"> Buy or lease storage space Create an ad hoc committee to help with efforts to address purchase or lease decision. 	Ongoing	\$250K -- \$500K (purchase price) + ongoing security cost?	By August 2023 have a long term storage solution	Executive Director
<p>d. Annually engage with DCR, including through the matching funds program, to maintain and improve the facility.</p> <p>Facility Improvements:</p> <ul style="list-style-type: none"> Additional air conditioned and isolated places Develop lighting plan around the dock to better serve our needs. Improve the shade for the high performance dock 	Ongoing	<p>Yr 1 - \$150K</p> <p>Yr 2 - \$75K</p> <p>Yr 3 - \$75K</p>	Engage with DCR annually about at least 1 capital improvement	Executive Director, Director of Operations, Director of fleet and Facility

Goal #3: Increase participation across a range of dimensions including race, ethnicity, socioeconomic status, gender, and ability.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Maintain existing partnerships as well as explore new affiliations with community-based organizations to bring CBI to a more diverse community of participants.	FY23Q1	\$10k	1. Increase number of community based partnerships by 1 per year. 2. Retain at least 75% of current partnerships year after year.	Director of Operations
b. Streamline application processes to participation to eliminate financial barriers in the Junior and Adult Program. <ul style="list-style-type: none"> ● Review JP sliding scale annually and update where needed. Maintain relevance of sliding scale to lower income level (those not receiving benefits) ● Review AP adult program discounts annually and update as seems fit ● Pilot other payment options we don't currently use. ie Apple pay, paypal 	FY23Q1	\$0	Maintain at least 25% - 33% of sliding scale juniors Implement special circumstance discount in the database for AP by Dec 2023 Implement Apple pay and Google pay by April 2023	Community Relations Director & Director of Administrative Services

Goal #3: Increase participation across a range of dimensions including race, ethnicity, socioeconomic status, gender, and ability.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
<p>c. Increase staff diversity through the junior program instructor-in-training program and throughout the staff in order to demonstrate a workforce that better mirrors a more diverse population we wish to serve.</p> <ul style="list-style-type: none"> Pilot a paid instructor in training program to increase pool of candidates 	FY23 Q12	<p>\$4,000 per IIT</p> <p>Year 1: 6 IITs (\$24K)</p> <p>Year 2 and on: 10 IITs (\$40K)</p>	<p>-- Launch program with 6 IIT's in year one and then 10 from then on</p> <p>-- Recruit at least 75% who are beneficiaries of CBI's sliding scale as IIT staff.</p> <p>-- Half of the Adult Program staff are IIT alumni.; at least 25% of the junior program staff are IIT alumni</p>	Director of Operations
d. Hire extra staff as instructors to support rating growth.	FY23 Q2	<p>\$6K/person = \$30K/year</p> <p>5 days/wk x 5 staff x 12 weeks x 25 hrs/wk x \$20/hr)</p>	<p>Member will achieve ratings at similar rates regardless of background within 5 years.</p>	Director of Sailing Programs

Goal #3: Increase participation across a range of dimensions including race, ethnicity, socioeconomic status, gender, and ability.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
<p>e. Perform ongoing data analysis to identify inequities in learning outcomes associated with race, ethnicity, gender, age etc. and to identify ways CBI can improve education, sailing opportunities or class offerings to address these inequities.</p> <ul style="list-style-type: none"> ● Explore options to better capture demographic data ● Annually perform a member experience survey. 	FY23 Q1	\$10,000/year	Draw conclusions and make recommendations from the outcomes of the data analysis	Executive Director
f. Staff Training: engage external experts regarding best practices related to accessible sailing	FY 23Q2	\$5K/year	2 experts will be engaged annually for the training for UAP staff	Director of Sailing Programs

Goal #4: Continue to develop innovative educational opportunities that relate to sailing across all CBI programs

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	Who Leads?
<p>a. Continued innovation of learning in all programs (<i>adult, junior, UAP, etc.</i>), including online opportunities.</p> <ul style="list-style-type: none"> Develop the e-learning curriculum through the intermediate and advanced classes. 	FY24Q4	\$10,000/class x 4 (2 classes launch in '24; 2 classes in '25 and 2 classes in '26 (\$10K OTO expense; cost to maintain)	<ul style="list-style-type: none"> Develop and publish online resources for intermediate classes by Dec 2023 Develop and publish online resources for advanced classes by Dec 2024 	All program directors
<p>b. Continue to integrate innovative educational STEAM activities into all programs.</p> <ul style="list-style-type: none"> Develop STEAM curriculum into Junior Program Host a series of lectures or seminars that include STEAM topics open to the whole community per season 	FY23Q2	\$1,500 (Speaker fees or honorarium)	<ul style="list-style-type: none"> Host 2 or more lectures for all programs At least 5 STEAM classes per week for the Junior Program 	Executive Director, Director of Operations, Director of Sailing Programs

Administrative



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Administrative Goals

1. Develop succession plan to ensure continuity of executive leadership for Executive Director and senior staff.
2. Increase the community's awareness of CBI through enhanced marketing and community visibility efforts.
3. Upgrade CBI technology to ensure strongest efficiency in program implementation and management of administrative functions
 - a. Maintain and keep current CBI web site, including on-line learning materials.
 - b. Maintain and upgrade CBI data infrastructure with respect to software obsolescence and increase functionality for members and staff.
 - c. Expand on database reporting systems
4. Advance staff recruitment and retention practices to ensure continuity of talent and to build strongest staff team possible to deliver CBI programs and services.
 - a. Conduct compensation and benefits study to ensure we're offering competitive wages

GOVERNANCE

5. Improve the board's and corporation's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

Goal #1: Develop succession plan to ensure continuity of executive leadership for Executive Director and senior staff.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Review and define CBI senior leadership roles, especially Executive Director, based on future needs of the organization.	FY23Q1	\$0	Job descriptions completed.	Executive Director
b. Support professional development to management and leadership team.	FY23Q1	\$10,000/year	Emerging staff positioned to assume advanced leadership position.	Executive Director / Director of Operations
c. Build pipeline of Executive Director candidates to succeed Charlie at point of retirement.	FY23Q1	\$0	List developed and stewardship of potential candidates launched.	Executive Director

Goal #2: Increase the community's awareness of CBI through enhanced marketing and community visibility efforts.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Define target audience(s) and determine community awareness goals for each (1) Adult recreation (2) Youth (3) Accessibility community (4) Funders/Prospects – individuals / corporations / foundations (5) All Others in the Community	FY23Q1	\$0	<ul style="list-style-type: none"> Prioritize markets based on importance to CBI Define community awareness goals for each. Develop implementation plan. 	Community Relations Director

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Goal #3: Support, maintain, and upgrade CBI IT as needed to ensure it meets the evolving needs of programs

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Annually review, and maintain, update IT infrastructure. <ul style="list-style-type: none"> a. Website b. Database c. Hardware d. Communication (db emails and bb emails) e. Wifi f. Servers & hosting companies g. Cloud services 	FY23 Q1 - ongoing	\$25K	Consult with IT staff monthly	Executive Director, Director of Operations, Community Relations Director and Director of IT
b. Conduct annual member experience survey	FY23 Q3 - ongoing	\$0	Send 1 member experience survey per year per program.	Community Relations Director
c. Expand on database reporting systems	Ongoing	\$10K	Analytic reporting tools <ul style="list-style-type: none"> • memberships • rating • demographics • trends 	Director of IT

Goal #4: CBI will employ best practices to recruit and retain staff to ensure best programming

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Juniors, IIT development and advancement to create a pipeline to dock staff, etc.	FY23 Q1 - ongoing	\$1500	<ul style="list-style-type: none"> Rating structure for instructors (volunteer and staff) IIT Priebatsch Coordinator recruits at least 5 youth volunteers for job interviews Have at least 3 activities, including skill training, per off season 	Executive Director
b. Staff Recruitment <ul style="list-style-type: none"> Market CBI employment opportunities both internally and externally <ul style="list-style-type: none"> Job referral incentives Job fairs US Sailing conference Job postings 	FY23 Q1 - ongoing	\$10K	<ul style="list-style-type: none"> 2 Job fairs annually 10 Job postings per year Attendance at at least 1 sailing conference per year 	Executive Director
c. Staff Retention <ul style="list-style-type: none"> competitive compensation progressive employment practices <ul style="list-style-type: none"> continuing education, professional development & relevant coursework 	FY23 Q1 - ongoing	\$15K	<p>% of staff who stay with CBI</p> <p>Increase minimum wage to align with state law.</p>	Executive Director

Governance



Governance Goals: Board

OBJECTIVE: Improve the board's and corporation's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

Goals:

- a. Reimagine the role of the Recruitment Committee and evolve into a formal nominating committee. Evolve the role from primarily being focused on adding corporation members to one in which the primary responsibility to build a strong board, including inviting non-corporation members to join the Board of Directors, and then attracting new membership to the corporation. Enhance the value of the board to CBI as a management, marketing, development, political and philanthropic resource.
- b. Enhance minimum criteria required and strengthen evaluation process in order to be considered for Board membership.

Governance Goals: Board

- c. Increase formal expectations of Board membership, especially as it relates to supporting revenue generation for CBI and establishing revenue generating requirements. Hold the board accountable for focusing on strategic issues facing CBI, adjust meeting agenda so that the board moves away from looking inward at programs and operations, and empowering the staff to manage and make decision related to internal program and operations.
- d. Increase the size of the Board to 13-15 members, but not to exceed 15.
- e. Shift the number of Board meetings to 4 per year, and increase the number of subcommittees, with subcommittees meeting in months when the board doesn't. Sub-committees should include Finance (formerly known as 'Budget'), Nominating (formerly known as 'Recruitment'), DEI (diversity, equity, inclusion) and Fund Development. Sub-committees include board and non-board members.
- f. Board members have responsibilities, they aren't just figureheads. <https://www.mass.gov/doc/ags-guide-for-board-members-of-charitable-organizations/download>

Goal #5: Improve the board's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Reimagine the role of the Recruitment Committee and evolve into a formal nominating committee. Evolve the role from primarily being focused on adding corporation members to one in which the primary responsibility to build a strong board, including inviting non-corporation members to join the Board of Directors, and then attracting new membership to the corporation. Enhance the value of the board to CBI as a management, marketing, development, political and philanthropic resource.	FY23 Q1	\$0	Nominating Committee established, new Board Members recruited that align to future vision.	Executive Director and Board Chair
b. Enhance minimum criteria required and strengthen evaluation process in order to be considered for Board membership.	FY23 Q1	\$0	New criteria established.	Executive Director and Board Chair

Goal #5: Improve the board's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
c. Increase formal expectations of Board membership, especially as it relates to supporting revenue generation for CBI and establishing revenue generating requirements. Hold the board accountable for focusing on strategic issues facing CBI, adjust meeting agenda so that the board moves away from looking inward at programs and operations, and empowering the staff to manage and make decision related to internal program and operations.	FY23 Q1	\$0	<p>New expectations established</p> <p>Board supports revenue attainment</p> <p>Board meetings become less operationally focused and more strategic</p>	Executive Director and Board Chair
d. Increase the size of the Board to 13-15 members, but not to exceed 15.	FY23 Q1	\$0	Board increased to 15 members	Executive Director and Board Chair

Goal #5: Improve the board's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
e. Shift the number of Board meetings to 4 per year, and increase the number of subcommittees, with subcommittees meeting in months when the board doesn't. Sub-committees should include Finance (formerly known as 'Budget'), Nominating (formerly known as 'Recruitment'), DEI (diversity, equity, inclusion) and Fund Development. Sub-committees include board and non-board members.	FY23 Q1	\$0	Subcommittee work launched 4 Board meetings a year	Executive Director and Board Chair
f. Board members have responsibilities, they aren't just figureheads. https://www.mass.gov/doc/ags-guide-for-board-members-of-charitable-organizations/download	FY23 Q1	\$0	Board members assume new responsibilities	Executive Director and Board Chair

Governance Recommendations: Corporation

Goal #5: Improve the corporation's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

Shift the expectations of selection of and membership in the Corporation:

- a. Enhance minimum criteria required and evaluation process in order to be considered to join the Corporation.
- b. Emphasize to future corporation members that a sailing-resume and social relationships alone are not sufficient for membership.
- c. Build formal evaluation practices for membership consideration and greater expectations related to membership.
- d. Remove any minimum size requirements for the Corporation.
- e. The purpose of the Corporation is to support the mission of CBI.
- f. The corporation should be representative of those who care about the organization, and show their care through ongoing contributions of time, talent, and treasure.
- g. Develop formal expectations for work, wealth and and wisdom for corporation members.

Governance Recommendations

h. Shift the expectations of selection of and membership in the Corporation:

- **Adjust the role and engagement of a member of the corporation to:**
 - Shift the “corporation” from voting on board members to serving on a nominating committee that recommends to the board the annual slate of board members as well as recommends new members of the “corporation” which is renamed the “board of advisors”.
 - Board members do NOT have to come from the Corporation alone.
 - The corporation should be in charge of "boosting" volunteerism with awards and recognitions. \$ collected from corporation membership dues (fees?) should be donated to CBI for general purposes (unrestricted)
 - Increase the role of the corporation members to support revenue generation.
 - Advocate for and champion CBI and its role in the community.

Goal #5: Improve the corporation's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
<p>a. Enhance minimum criteria required and evaluation process in order to be considered to join the Corporation. Emphasize to future corporation members that a sailing-resume and social relationships alone are not sufficient for membership.</p> <p>b. Emphasize to future corporation members that a sailing-resume and social relationships alone are not sufficient for membership.</p> <p>c. Build formal evaluation practices for membership consideration and greater expectations related to membership.</p> <p>d. Remove any minimum size requirements for the Corporation.</p>	FY23 Q1	\$0	<p>New corporation membership criteria Established</p> <p>Formal evaluation practices</p> <p>No size constraints to corporation</p>	Executive Director and Board Chair

Goal #5: Improve the corporation’s effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
e. The purpose of the Corporation is to support the mission of CBI.	FY23 Q1	\$0	Purpose re-defined and membership contributes time, talent and treasure.	Executive Director and Board Chair
f. The corporation should be representative of those who care about the organization, and show their care through ongoing contributions of time, talent, and treasure.				
g. Develop formal expectations for work, wealth and wisdom for corporation members.	FY23 Q1	\$0	100% giving by the “Corporation” members.	Executive Director and Board Chair

Goal #5: Improve the corporation's effectiveness by evolving governance practices, increasing revenue-generating expectations, and utilizing time and role more efficiently and strategically.

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing Incremental Cost KPI's What Position Leads?
<p>h. Adjust the role and engagement of a member of the corporation to:</p> <ul style="list-style-type: none"> i. Shift the “corporation” from voting on board members to serving on a nominating committee that recommends to the board the annual slate of board members as well as recommends new members of the “corporation” which is renamed the “board of advisors”. ii. Board members do NOT have to come from the Corporation alone. iii. The corporation should be in charge of "boosting" volunteerism with awards and recognitions. \$ collected from corporation membership dues (fees?) should be donated to CBI for general purposes (unrestricted) iv. Increase the role of the corporation members to support revenue generation. v. Advocate for and champion CBI and its role in the community. 	<p>FY23 Q1</p> <p>\$0</p> <p>KPI: Role redefined</p> <p>Executive Director and Board Chair</p> <p>(36)</p>

Fiscal Goals

OBJECTIVE: Strengthen and diversify our financial structure through an intentional balance of membership revenue, corporate support, charitable giving, and grants



Fiscal Goals

OBJECTIVE: Strengthen and diversify our financial structure through an intentional balance of membership revenue, corporate support, charitable giving, and grants

1. Expand **sponsorship program** to create additional sponsorship opportunities and to increase revenue.
 - a. A. Secure sponsorship of select CBI programs
 - b. B. Add 'sponsorship or branding' to other capital opportunities, i.e. Windsurfing, keelboats, lasers, paddle boars, etc.
 - c. C. Build pipeline of potential investors by working with Board and staff leadership to create formal corporate partnership and sponsorship program to maximize sponsorship opportunities.
 - d. Establish relationships with key industry and business associations to build CBI's awareness, secure introductions and attract support.
2. Establish **philanthropic giving program** to attract charitable support from individuals/families, corporations and foundations. Increase % of funding from philanthropic resources.

STRATEGIES:

- a. Establish leadership giving program and attract increased number of leadership and major gift contributors to advance programmatic goals.
 - b. Attract foundation grants to further support programs.
 - c. Build event strategies to support revenue-generating and community awareness for the organization.
 - d. Attract multi-year plans, sustainable support to capitalize programs and operations.
 - e. Invigorate Board to play a larger role in fundraising. Create 'give/get' expectations for board members.
 - f. Explore the potential of a capital campaign in order to fund capital expenses (building, equipment, boats)
 - g. Build the organization's fundraising capacity by hiring a development professional(s) to join staff team
3. Double the **endowment** expectancies from \$3M to \$6M..
 - c. Relaunch and market **planned giving** opportunities and attract legacy support (\$1M - \$1 1/2M already in expectancies)
 - d. Identify donors with interest in investing in endowment and seek their support to grow the CBI endowment.

Goal #1: Expand **sponsorship program** to create additional sponsorship opportunities and to increase revenue.

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Secure sponsorship of select CBI programs.	FY24 Q2	\$0	Increase sponsorship to #3	Community Relations Director
b. Add 'sponsorship or branding' to other capital opportunities, i.e. Windsurfing, keelboats, lasers, paddle boars, etc.	FY24 Q3 and ongoing	\$3K	Increase sponsorship to #3	Community Relations Director
c. Build pipeline of potential investors by working with Board and staff leadership to create formal corporate partnership and sponsorship program to maximize sponsorship opportunities.	FY24 Q2	\$0	Build partnership program Attract corporate partners	Community Relations Director
d. Establish relationships with key industry and business associations to build CBI's awareness, secure introductions and attract support.	FY25 Q1	Yr 1 = \$1K Yr 2 = \$3K	Professional association leadership introducing you to new prospects	Community Relations Director

Goal #2: Establish **philanthropic giving program** to attract charitable support from individuals/families, corporations and foundations.
Increase % of funding from philanthropic resources.

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Establish leadership giving program and attract increased number of leadership and major gift contributors to advance programmatic goals	FY24 Q3	\$0	Launch program Attract #100 \$1K+ givers	Executive Director and Board Chair
b. Attract increased # of foundation grants to further support programs	FY23 Q1 and ongoing	\$0	Raised increased \$50,000 from foundation supporters	Kyle
c. Build event strategies to support revenue-generating and community awareness for the organization.	FY24 Q2	\$5K	\$ raised from event attendees through follow-up	Community Relations Director
d. Attract multi-year plans, sustainable support to capitalize programs and operations	Ongoing	\$0	Multi-year \$\$ raised	Executive Director

Goal #2: Establish **philanthropic giving program** to attract charitable support from individuals/families, corporations and foundations. Decrease reliance on membership support and increase % of funding from philanthropic resources.

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
e. Invigorate Board to play a larger role in fundraising. Create 'give/get' expectations for board members.	FY23Q4	\$0	Board opens doors and raises \$50,000.	Executive Director and Board Chair
f. Explore the potential of a capital campaign in order to fund capital expenses (building, equipment, boats)	FY25 Q2	\$0K	Raise capital to address Program Goal #2 needs	Executive Director and Board Chair
g. Build the organization's fundraising capacity by hiring a development professional(s) to join staff team	FY25Q1	\$60K - \$125K	Hire dedicated staff	Executive Director (41)

Goal #3: Double the **endowment** expectancies from \$3M to \$6M..

OWNER: Executive
Director and Board Chair

Strategies to Achieve Goal	Timing	Incr. Cost	KPI	What Position Leads?
a. Relaunch and market planned giving opportunities and attract legacy support (\$1M - \$1 1/2M already in expectancies)	Relaunching	\$0	#10 of \$500,000 in expectancies from donor's estate plans	Executive Director and Kyle.
b. Identify donors with interest in investing in endowment and seek their support to grow the CBI endowment.	FY25	\$0	Secure #10 donors and secure \$500,000 in funding	Executive Director

Thank You!



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