

**Strategic Plan**

**Of the**

**Council**

**Of**

**Ohio Audubon Chapters**

**(COAC)**

**2006**

## **Table of Contents**

Introduction by the President of the Council	Page 2
Mission, Vision, and Values	Page 3
Organizational History and Profile	Page 4
Summary of Core Strategies	Page 5
Strategies, Goals, and Objectives	Page 6
Appendix A. Annual Operating Plan for 2006-2008	Page 7
Appendix B. Chapter Regions in Ohio	Page 8
Appendix C. Helping Chapters Write a Development Plan	Page 12
Appendix D. Long-Range Budget Projection	Page 20
Appendix E. Membership of the Strategic Planning Committee	Page 21

## **Introduction by the President of the Council**

On behalf of the trustees of the Council of Ohio Audubon Chapters (COAC), it is my honor to introduce the strategic planning document that is enclosed in the following pages.

This plan is the culmination of four months of intensive work by the trustees. During that period, we conducted 15 one-hour telephone conference calls and held three retreats. Our strategic planning committee, comprised of the trustees, worked hard to make this document a reality. Foremost in our minds throughout our deliberations was the need to help the Audubon chapters in Ohio.

We looked closely at our strengths and our vulnerabilities, and learned from the process. As a result, over the next three years, we decided to focus our efforts on three areas: communicating and collaborating with outside organizations, helping our chapters, and reviewing requests that outside entities make on our limited resources. The strategic plan contains a summary of these core strategies, our mission and vision, goals and objectives, and an annual operating plan for the remainder of 2006.

We also decided to offer chapter leaders help on creating a development plan to raise money for programs and sustainability. This information is in Appendix B. In addition, we felt it would be beneficial for chapter leaders to see how COAC plans to allocate its funds. As a result, we created a one-year budget projection, which is in Appendix C.

Thank you for your interest in COAC.

Sincerely,

Delle Nadler, President of COAC



## **Mission, Vision, and Values**

### **Mission Statement**

The mission of the Council of Ohio Audubon Chapters (COAC) is to improve support for chapters and enhance communications among chapters, Audubon Ohio, and the National Audubon Society.

Our slogan is “Connecting Ohio Audubon Chapters.”

### **Vision Statement**

Our chapters are an important constituent, and with our help, will communicate with one voice, understand each other’s best practices, and work together for the common good of all Audubonners.

### **Values**

Chapters are an important component of Audubon Ohio and the National Audubon Society.

Respect for all Audubonners is paramount.



## **Organizational History and Profile**

### **History**

1969 – The Ohio Audubon Council (OAC) was formed.

1982 - OAC establish the Adopt-a-Refuge Program and adopted the Ottawa National Wildlife Refuge. This program allowed chapters to contribute to a fund to make direct purchases of items the refuge needed but could not purchase from its restricted budget.

1987 – OAC began a Audubon Camp Scholarship Grant Program to help chapters sponsor people to attend Audubon Ecology Camps.

1988 - OAC began a joint venture between Ohio State University and Ohio Division of Wildlife to sponsor two-year fellowships for graduate students.

2002. Thirteen of 19 chapters voted to change the name of OAC the Council of Ohio Audubon Chapters (COAC), as well as change its mission. The trustees wrote new bylaws that gave Audubon chapters in Ohio an independent, collective voice.

2005. COAC held a retreat with delegates of 12 of the 19 Audubon chapters in Ohio in attendance. A professional facilitator offering pro bono services guided delegates through visioning exercises resulting in action plans in seven key areas.

2006. COAC gave a scholarship to an Ohio educator to attend the Audubon Bird Camp in Hog Island, Maine.

2006. COAC trustees decided to undertake a strategic planning process. Self-facilitated, the process resulted in COAC's first strategic plan that provides COAC with direction for the future.

### **Profile**

COAC is comprised of a board of six trustees, each serving staggered, three-year terms. The council consists of 18 Audubon chapters in Ohio. Assets in 2006 were \$17,000, which served as an endowment to provide scholarship funds to send an Ohio educator to the annual Audubon Bird Camp in Hog Island, Maine.

4

8

## Summary of Core Strategies

The following three overarching strategies will determine COAC's goals and objective for the next three years.

1. *Communicate and collaborate with Audubon Ohio and other entities.* In 2001, the National Audubon Society reduced the dues share to chapters to a safety net. Chapter leaders realized they had to develop innovative ways to contain costs and fund-raise in order to deliver the same level of services they had in the past. Many chapters felt they had to develop an independent voice in order to make their ardent views known to the national and state organizations. COAC believes that Audubon Ohio is a resource for chapters, and that the development of healthy chapters depends on maintaining a healthy dialogue with that office. Moreover, our strength lies in staying in touch with entities outside of the Audubon community, such as conservation and environmental organizations. We will partner with them at every opportunity in order to help our chapters stay vibrant.

2. *Review proposals COAC receives to see if they are within our mission to fulfill.* While we need to partner with other organizations both inside and outside the Audubon community, we feel it is necessary to limit our commitments to them because we have limited financial, administrative, and personnel resources. Examination of requests for our help will determine if they are within our mission and deserving of our time and resources.

3. *Work with chapters that want our help.* Recognizing that our chapters have limited resources, we see ourselves as a resource to them. We want to help chapters that are willing to accept our guidance. We also have some chapters that do not presently work closely with COAC, or Audubon Ohio, but we want to continue to be a resource for them, as well. COAC is not made up merely of the trustees, but of all the chapters in Ohio, and therefore, our strength lies in having a network of strong chapters and members.



## Strategies, Goals, and Objectives

Strategies	Goals	Objectives
Communicate and collaborate with Audubon Ohio and other entities.	<ul style="list-style-type: none"> <li>● Share and exchange information through newsletters and e-mail.</li> <li>● Communicate interactively with AO.</li> <li>● Identify common concerns.</li> </ul>	<ul style="list-style-type: none"> <li>● Have a trustee attend each quarterly AO board meeting.</li> <li>● Build a COAC section on the AO website.</li> <li>● Maintain a dialogue with AO's Executive Director.</li> <li>● Help AO analyze chapter annual reports.</li> <li>● Present COAC at various forums.</li> </ul>
Review proposals COAC receives to see if they are within our mission to fulfill.	<ul style="list-style-type: none"> <li>● Limit our commitments.</li> <li>● Stick to our priorities based on our resources.</li> <li>● Ensure our activities fit our mission.</li> </ul>	<ul style="list-style-type: none"> <li>● Review our list of proposals each time we meet and reallocate resources.</li> <li>● Constantly review priorities.</li> <li>● Just say no to requests not aligned with our mission.</li> <li>● Identify organizations best suited for requests that don't fall within our mission.</li> </ul>
Work with chapters that want our help.	<ul style="list-style-type: none"> <li>● Identify and nurture new leaders for chapters and COAC.</li> <li>● Continue to communicate with all chapters.</li> <li>● Be an outreach mechanism for chapters.</li> <li>● Hold two meetings a year.</li> <li>● Recognize innovation and celebrate successes.</li> <li>● Show chapters how we can help them.</li> <li>● Help chapters collaborate with other ecofriendly groups for mutual support.</li> <li>● Provide opportunities for constituents to financially support to our chapters and</li> </ul>	<ul style="list-style-type: none"> <li>● Hold regional meetings.</li> <li>● Have trustees visit chapters.</li> <li>● Find and showcase best practices.</li> <li>● Help chapters recruit volunteers.</li> <li>● Help chapters collaborate with other ecofriendly groups for mutual support.</li> <li>● Help chapters write development planx.</li> </ul>

	support their missions.	
--	-------------------------	--

## APPENDIX A

### Annual Operating Plan for 2006

RELATED STRATEGY	RELATED OBJECTIVE	ACTION STEP	RESPONSIBILITY	TIME FRAME
Communicate and collaborate with AO and other entities.	Have a trustee attend each quarterly AO board meeting.	Find out if any trustees who regularly attend AO board meetings are going to attend.	All trustees	Three months prior to any board meeting.
		Ask for a trustee to volunteer if no regular AO board meeting attendees are going to attend.	All trustees	Three months prior to any board meeting.
		If no trustee volunteers to attend, appoint the trustee who lives closest to the upcoming meeting site to attend.	All trustees	Three months prior to any board meeting.
	Build a COAC page on the AO website.	Ask AO to create a link to a COAC page that we would construct.	Bill	<i>Bill said Jerry can limited information on the AO website, and we would have to create our own website.</i>
	Maintain a dialogue with the AO office.	Check in with AO on issues of mutual interest to COAC and AO.	Delle (as president)	As the need dictates.

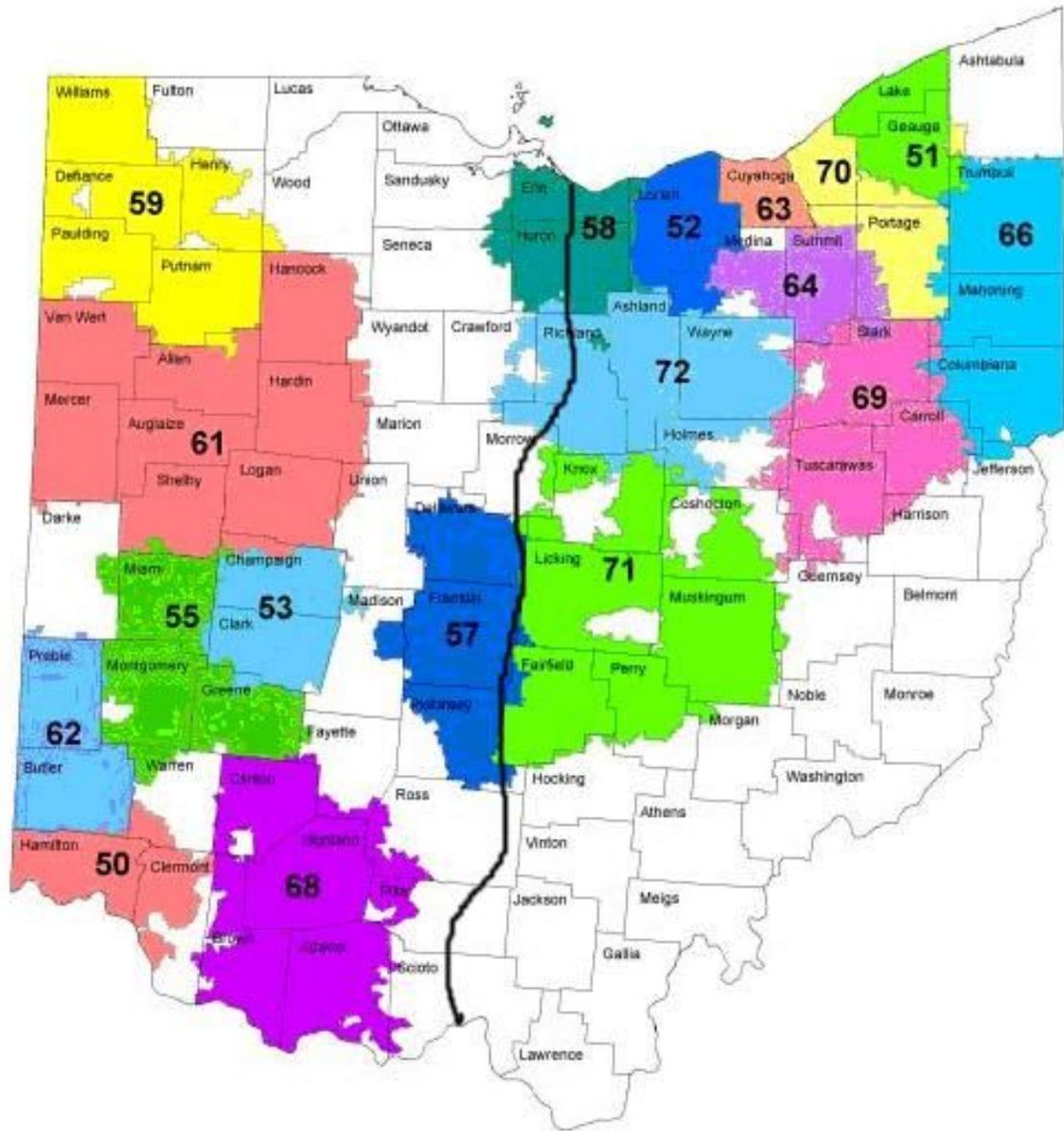
<b>RELATED STRATEGY</b>	<b>RELATED OBJECTIVE</b>	<b>ACTION STEP</b>	<b>RESPONSIBILITY</b>	<b>TIME FRAME</b>
		Take advantage of opportunities to connect with the AO office.	All trustees	When appropriate.
	Help AO analyze chapter annual reports.	Recruit a strong leader to chair the AO Chapter Relations Committee.	All trustees.	On-going.
	Talk about COAC at various forums to keep people informed about us.	Submit notices of COAC initiatives for posting on AO E-Newsletter and COAC page of AO website.	Delle (as president)	As needed.
		Visit other organizations.	All trustees	When possible
		Submit COAC news items to other organizations for posting to their newsletters and websites.	All trustees	When possible
Work with chapters that want our help.	Hold regional meetings with Ohio chapters once a year.	Construct chapter regions in Ohio.	Dick	Appendix B shows two regions.
		Contact all chapter leaders to achieve buy-in for regional meeting concept.	All	Nov 11.

RELATED STRATEGY	RELATED OBJECTIVE	ACTION STEP	RESPONSIBILITY	TIME FRAME
		Schedule regional meetings and ensure that a trustee attends each meeting.	All trustees	Nov 11
		Have a program to offer at each regional meeting.	All trustees	Nov 11
	Find and showcase best practices.	Define what a best practice is.	<i>Tom (Best practices are practices that, when shared, can help individuals or groups improve, without regard to whether they are really the best).</i>	July 16
		Ask chapters what practices have worked for them that they would like to share with other chapters.	Trustees	Work into assembly as a workshop.
	Have trustees engage chapters at least once a year.	Combine trustee visits with regional meetings.	All trustees.	On-going.
	Help chapters collaborate with other ecofriendly groups for mutual support.	Encourage chapters to connect with ecogroups to support environmental issues and programs.	Trustees who attend regional meetings.	During each annual regional meeting.

RELATED STRATEGY	RELATED OBJECTIVE	ACTION STEP	RESPONSIBILITY	TIME FRAME
	Help chapters collaborate with other ecofriendly groups for mutual support.	Create a master list of ecogroups to share with chapters, including goals and contacts of each ecogroup.	Chapter leaders	As support is generated from each chapter.
		Provide chapters with a template for collecting information about ecogroups to give back to COAC.	Tom will create an Excel spreadsheet that chapters can update.	Nov 11.
	Help chapters write a development plan.	Create an appendix that provides an outline or menu or toolkit of what chapters can include in their own development plans.	Trustees contribute per action plan of June 23.	Appendix C shows the parts of a typical plan.
Review proposals COAC receives to see if they are within our mission to fulfill.	Review proposals that come to COAC from other organizations.	Review our own action plans that have time frames and seek clarity on those we question.	Trustees	Each time we meet.
		Review proposals that other people are making to us. Ask if we are responsible for executing a proposal. If we are and cannot do it, seek	Trustees	Each time we meet.

		collaborators.		
--	--	----------------	--	--

**APPENDIX B - Proposed Chapter Regions in Ohio**



50 – AS of Ohio  
 51 – Blackbrook AS  
 52 – Black River AS  
 53 – Clark County AS  
 55 – Dayton AS  
 57 – Columbus AS

58 – Firelands AS  
 59 – Black Swamp AS  
 61 – Tri-Moraine AS  
 62 – Audubon Miami Valley  
 63 – Western Cuyahoga AS  
 64 – Greater Akron AS

66 – AS Mahoning Valley  
 68 – Appalachian Front AS  
 69 – Canton Audubon Society  
 70 – AS of Greater Cleveland  
 71 – East Central Ohio AS  
 72 – Greater Mohican AS

## **APPENDIX C**

### **Helping Chapters Write a Development Plan**

All chapters need to raise funds in order to make an impact and sustain themselves. A well-designed development plan offers many opportunities to acquire adequate funding. This appendix provides a menu or toolkit of what chapters can include in their own development plans. An example of each item is included in the accompanying tabs.

Tab A: Levels of membership.

Tab B: Annual appeal letter.

Tab C: Bequests.

Tab D: Planned giving.

Tab E: Fund-raisers.

Tab F: Endowment.



## APPENDIX D

### One-Year Budget Projection

#### COUNCIL OF OHIO AUDUBON CHAPTERS

Statement of Operating Funds for COAC Fiscal Year Beginning July 1, 2006 and Ending June 30, 2007, Showing Quarterly Cumulative Income, Expenses, and Budget, along with Annual Income, Expenses, and Budget.

Qtr Cum	Qtr Cum	Qtr Cum			Annual	
Actual	Budget	Deviation		Actual	Budget	Deviation
			<b>Income</b>			
			Interest (Savings and CDs)	\$400.00		
			Fall Retreat or State Assembly	\$0.00		
			Spring Annual Meeting	\$325.00		
			Hog Island Scholarship Pledges	\$500.00		
			Donations	\$50.00		
			Sponsorships and Donations	\$455.00		
			Total income	\$1,730.00		
			<b>Expenses</b>			
			Conference Calls by Trustees	\$200.00		
			Hog Island Scholarship	\$1,100.00		
			Fall Retreat or State Assembly	\$200.00		
			Spring Annual Meeting	\$230.00		
			Total expenses	\$1,730.00		
			Excess of income			



## **APPENDIX E**

### **Membership of Strategic Planning Committee**

Following is the list of trustees who served on the 2006 COAC Strategic Planning Committee:

Delle Nadler, President (Greater Akron Audubon Society)

Tom Romito, Vice President and Facilitator (Western Cuyahoga Audubon Society)

Nancy Brundage, Secretary (Mahoning Valley Audubon Society)

Alan Dolan, Treasurer (Canton Audubon Society)

Louise Fleming (Greater Mohican Audubon Society)

Richard Balk (Dayton Audubon Society)

Bill Heck (Audubon Miami Valley)

