



## 2020 – 2021 Strategic Plan ADDENDUM

As 2020 began, Calmer Choice was poised to successfully complete year 1 of our strategic plan on target. We were on or ahead of plan in many areas, and had good momentum coming into the second half of our fiscal year. *Then our world – everyone’s world – changed.*

Overnight everything stopped – programs, training, fundraising events – as we grappled with regulations put in place to prevent the spread of the coronavirus. Organizations struggled to adapt, with many absorbing irreversible damage. Gratefully, Calmer Choice was not one of those organizations. To the contrary, our incredible team of dedicated professionals and outpouring of support from our funders and friends allowed us to pivot like few other organizations.

Again, nearly overnight, our programs became virtual, our fundraising was taken to another level, and Calmer Choice answered the call from a community looking for help, support, and kindness – a reason to believe everything would be okay.

As you’ll see in this addendum to our 2019-2022 Strategic Plan, we accomplished more than we ever imagined possible given the unprecedented circumstances that surrounded us. Despite constantly changing regulations and so much uncertainty, we delivered like never before.

We did have to make tough operational and staffing decisions in order to protect our financial stability, reducing our staff and freezing operational expenses. We created content and a means to deliver it safely, expanding our reach far beyond our in-person footprint. We called on our funders and friends for additional support of our mission, and they responded with such generosity that we posted our largest fundraising period (April – May) in our 10-year existence. A true testament to the community's understanding of the important work we do.



**Calmer Choice**  
Celebrating a decade, one breath at a time

While our strategic plan continues to be our roadmap – relevant and resilient as a sound plan should be – we adjusted specific tactics in the plan to accommodate to the current environment and shuffled future tactics appropriately. We also added a strategy to the "Leadership, Management, Staffing and Operations" section of the plan to reflect a key priority that has emerged over the past year – becoming an anti-racist organization at every level.

We are so fortunate to have this plan in place. The hard work building it is certainly paying dividends. Rather than scrambling to react to the chaotic circumstances, we proactively leveraged our roadmap knowing its foundation was solid.

With plenty of uncertainty ahead, Calmer Choice is well-positioned to weather the coming months. Hard times will likely continue for some time. We're prepared to answer the call for our services... a call that may be greater than any we've had in our history.

## Programming: Year 2 Action Steps

### GOAL 1

#### Launch Updated Calmer Choice Curriculum

##### STRATEGY 1

##### Complete curriculum for school and community

- Research and identify outcomes for participants
- Use identified outcomes to create and implement an evaluation tool to measure outcomes and success
- Submit completed curriculum for graphic design

##### STRATEGY 2

##### Copywrite and publish school curriculum

- Hire copywrite attorney and publisher
- Work with attorney and publisher to ensure target publication date in 2021 is reached

### GOAL 2

#### Develop and Pilot a Model for the Calmer Choice Institute

##### STRATEGY 1

##### Develop a business model for the Institute

- Develop timeline and pilot strategy for implementation
- Create benchmarks for success

##### STRATEGY 2

##### Define, refine and implement service delivery models for schools, community and targeted groups

- Create alternate models of service
- Identify specific schools, community organizations and targeted groups for first pilot of the Institute in July 2021
- Explore developing the Calmer Choice instructor training as a college level course for the 2021-2022 school year

##### STRATEGY 3

##### Develop Calmer Choice online services

- Determine and develop menu of online services, both fee-based and free
- Develop business model and pricing structure for online learning platform
- Develop model for training and supporting users of online platform (i.e., combination of in-person and distance training, mentoring program, etc.)
- Develop promotional strategies for online services
- Develop pilot strategy for implementation
- Create benchmarks for success
- Identify online learning platform and work to generate, organize and upload all content

# Leadership, Management, Staffing & Operations: Year 2 Action Steps

## GOAL 1

### Professionalize Management and Staffing of Calmer Choice

#### STRATEGY 1

##### Create more centralized management

- Create and implement performance review structure
- Continue to adapt the organizational structure, if necessary, in response to COVID-19
- Implement new reporting structure within the organization

#### STRATEGY 2

##### Clarify management and staff roles, responsibilities and training needs

- Explore creation of staff professional development program
- Identify budget needs for professional development program
- Implement professional development program
- Explore/rewrite job descriptions for new organizational structure
- Create succession plan for all roles/CEO

#### STRATEGY 3

##### Create robust professional volunteer program

- Explore and Identify roles that volunteers could fill and committees they can support
- Create job description for volunteer coordinator and identify reporting structure
- Recruit and hire volunteer coordinator

## GOAL 2

### Improve Operational Excellence at Calmer Choice

#### STRATEGY 1

##### Create standardized policies and procedures to support operations

- Create new internal policies and procedures and develop process for feedback and approval
- Begin rollout of new policies and procedures
- Identify structure for oversight and accountability

#### STRATEGY 2

##### Identify technology solutions to support internal operations of Calmer Choice

- Conduct ongoing assessments on use of technology
- Continue staff training where needed to ensure all members of staff become agile in navigating all hardware, software and online platform-based technologies

#### STRATEGY 3

##### Improve data management

- Create new internal policies and procedures and develop process for feedback and approval
- Begin rollout of new policies and procedures
- Identify structure for oversight and accountability

## GOAL 3

### Improve Internal and External Communication at Calmer Choice

#### STRATEGY 1

##### Restructure staff meetings

- Explore further staff training needs in meeting facilitation
- Assess effectiveness of meeting structure

#### STRATEGY 2

##### Create opportunities for continued collaboration between programming and leadership

- Program manager/lead staff and leadership meet regularly to evaluate and support working relationship toward the goals of the strategic plan
- All staff attend one school-based program lesson per year
- All staff participate in one lesson of a community-based program per year
- All staff attend a target number of organization-wide events (CCC, holiday party, etc.)

#### STRATEGY 3

##### Create messaging and marketing strategy for all constituent groups

- Develop plan for keeping materials up-to-date and identify roles and responsibilities in doing so
- Explore design options with online learning platform for congruence with messaging and marketing strategy
- Create new marketing materials as needed for new offerings

#### STRATEGY 4

##### Create, develop and communicate an anti-racist culture across the entire Calmer Choice organization

- Create an anti-racist strategy for both board and staff of the organization – working towards our being an anti-racist organization
- Develop committee or counsel to spearhead this work, engaging consultants as needed

## GOAL 1

### Improve Communication and Engagement with Board

#### STRATEGY 1

##### Understand and leverage board member expertise and interest areas

- New board members are recruited to fill key voids in expertise and interest and to serve in committees where appropriate.
- New board member onboarding process is introduced, including possible board mentor program
- Annual individual meetings occur to survey progress and gather feedback
- Set expectations and targets for engagement (onboarding, give/get amount, 3x3, prospect introductions, event support, etc. – defining lanes)

#### STRATEGY 2

##### Refine and solidify messaging for board to leverage with external audiences

- Review and revise values statement
- Programming team to hold education and messaging discussions at board meetings as needed
- Develop official Calmer Choice board member ambassador program, identifying a core group of board members who support the CEO's 3 x 3 efforts to deepen and broaden external relationships with donors, partners and community members

#### STRATEGY 3

##### Improve engagement between board and staff/instructors

- Establish visit schedule for board members to see Calmer Choice in the Classroom (virtually)
- Consider pairing board member with instructor as networking contact/mentor
- Brainstorm with program staff ways to continue to promote engagement
- Encourage all board member to take an adult CC program for better understanding of what and how we actually teach

#### STRATEGY 4

##### Review charter, purpose, and membership of committees and evaluate effectiveness in relation to the needs of Calmer Choice

- Committees meet at regular intervals (TBD)
- Committee chairs report out at board meetings
- Revise board manual to reflect new committee/counsel structure
- Create succession plan model for the board

#### STRATEGY 5

##### Identify key areas for board engagement to support growth

- Based on board member feedback in individual meetings, generate a list of opportunities for board engagement beyond committee-specific work, which may include:
  - 3x3 strategy to engage board in fundraising and outreach, 10 year anniversary party, focus group on expansion, endowment
- Implement board stories as part of website and newsletter, featuring a new board member each month

## GOAL 2

### Create and Execute a Plan for Financial Sustainability

#### STRATEGY 1

##### Develop three-year budget and fundraising plan

- Identify and prioritize long-term financial goals, i.e.
  - Cash reserves, endowment, planned giving, capital campaign, expanded major gift program, national foundation support, school and community
- Utilize long-term goals to inform multi-year budget
- Explore the creation of a risk management plan
- Implement strategies to improve revenue collection efforts
- Updated Case for Support to reflect pandemic reality
- Identify additional potential revenue streams (i.e., online learning, strategic partnerships, etc.)

