

# Strategic Action Plan

**Presented to**



**Presented by**

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## Mission

To engage generations of Oregonians as active stewards of their communities, natural and built, to ensure people have meaningful and satisfying lives.

→ QUESTION FOR FURTHER DISCUSSION: The highlighted section includes the pre-retreat recommended purpose statement. At the retreat, at least one family member/board member noted that the refined mission statement (without the highlighted part) was still missing the larger purpose, though she was not necessarily convinced we still needed it. ACTION ITEM: Gray Family Foundation to determine whether to include.

## Vision

Oregon endures as a place characterized by its wealth of natural resources and sustainably built communities that can inspire, nourish and connect generation after generation.

## Values

Core values:

- Place-based
- Inclusive
- Knowledge-based
- Integrated disciplines
- Collaborative

Rooted in:

- Oregon-focused
- Inclusive of all Oregonians (urban, rural, all races and ethnicities, all socio-economic levels)
- Using knowledge to guide actions
- It's all connected: environmental literacy is tied to arts, culture, food health, native ecology, education, housing, transportation, energy and climate
- We encourage collaboration among groups

## Theory of Change

### Problem:

We need to create a citizenry that consistently stands up to protect our environment. We must dispel Oregon’s environmental myths like: “the environment here is good, or bad, or out of control...” or “it’ll always be the same...” or “the rain keeps it green.” People must come to understand the context and consequences of decisions big and small.

### Solution:

We must keep people connected to and knowledgeable about the environment – wild, rural, and built – and what keeps it healthy. This begins by helping more of our children grow into environmental stewards by getting them outside to understand and value nature. Once knowledgeable and connected, kids can influence their parents<sup>1</sup>, and parents can influence their kids.

### Strategies:

1. Champion accessible, experiential, content-laden outdoor education programs (formal and informal).
2. Inspire action to protect our environment (political action, personal behavior change, and civil discourse).
3. Hook into bigger opportunities beyond our own domain and knowledge that hold the potential to create environmental stewards (incubator research, PRIs, coalition-building).

### Impact:

This deep connection to the environment will propel Oregonians to keep their communities, natural and built, healthy and vibrant one generation after another.

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<sup>1</sup> For the purposes of this plan, “parents” is meant to be inclusive of all caregivers for children (parents, foster parents, other family members with primary responsibility for raising a child, etc.).

## Goals and Measurable Objectives

ACTION MEASURES		RESULTS MEASURES	
Input Goals (metric): <i>What we put in</i>	Output Goals (metric): <i>What we create</i>	Outcome Goals (metric): <i>What results</i>	Impact Goal (metric): <i>What difference it makes</i>
<ul style="list-style-type: none"> <li>• Grants (\$ amount)</li> <li>• Lobbying (\$ amount, time)</li> <li>• Coalition building (# members)</li> <li>• Research (#, types of studies)</li> <li>• Communications (newsletters, web site, report releases, etc.)</li> <li>• Teacher professional development (# participants)</li> </ul>	<ul style="list-style-type: none"> <li>• More public funding for experiential/ outdoor education (total \$)</li> <li>• Improved educational content (curriculum and teaching materials, # trained teachers, statewide education standards and practices)</li> <li>• Upgraded/ repaired camp infrastructure (positive visitor surveys, enhanced demand)</li> <li>• Diverse coalitions (bills introduced, % individuals/ groups representing diverse communities)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>More children</b> receiving longer outdoor education experiences (# participants, hours/ days outdoors)</li> <li>• Increased environmental and geography literacy (school testing metrics, surveys of participants)</li> <li>• Environmentally engaged Oregonians (voter participation, policy victories)</li> <li>• Model program for other states/ funders (# of replications)</li> </ul>	<ul style="list-style-type: none"> <li>• Clean air, clean water, healthy forests, and scenic beauty (track volunteer hours/ dollars donated to environmental protection organizations by participant families)</li> <li>• Strong regional food economy (survey food purchasing habits of participant families)</li> <li>• Increased energy independence (survey energy use and purchasing habits of participating families)</li> <li>• Appropriately planned growth (map impact of policy victories on development density)</li> </ul>

→ QUESTION FOR FURTHER DISCUSSION: Is the goal to get every child in Oregon an outdoor education experience? Is the emphasis still on children in grades 5-6 or something more? Depending on how this is answered, it will effect the funding goal and potentially funding strategy. ACTION ITEM: Gray Family Foundation to resolve this question and update goals/objectives as needed.

## Audience Assessment

→ FOR FURTHER DISCUSSION: The audiences noted below reflect those prioritized at the retreat. ACTION ITEM: Gray Family Foundation to conduct research and facilitate discussions to uncover findings to complete the grid (needs, actions, influencers, calls to action).

Audience	Primary Needs and Motivators	Primary Action Desired	Key Influencers	Call to Action
<b>PRIMARY AUDIENCE</b>				
School age children				
<b>PATHWAYS TO PRIMARY AUDIENCE (in priority order)</b>				
Teachers				
Parents (esp. of school-age children)				
External influencers on state budget				
School administrators				
Policymakers <ul style="list-style-type: none"> <li>• Governor</li> <li>• State legislature</li> <li>• Those that influence education budgets</li> <li>• Oregon Department of Education/ Board of Education; Oregon Education Investment Board/ Chief Education Officer; local school boards</li> </ul>				
Voters				
Non-profit organizations, community service organizations <ul style="list-style-type: none"> <li>• Environmental groups (TNC, OLCV)</li> <li>• School-related associations (e.g. PTAs)</li> </ul>				
Corporations (retailers, entertainment industry, app designers, etc.)				
Funders				
Healthcare providers				
Faith leaders				



## Action Plan: Key Strategies, Tactics, Timeline, and Resources

### Summary:

1. Champion accessible, experiential, content-laden outdoor education programs (formal and informal).
2. Inspire action to protect our environment (political action, personal behavior change, and civil discourse).
3. Hook into bigger opportunities beyond our own domain and knowledge that hold the potential to create environmental stewards (incubator research, PRIs, coalition-building).

### Detail:

→ FOR FURTHER DISCUSSION: The strategy details below reflect those discussed at the retreat. ACTION ITEM: Gray Family Foundation to expand on these concepts and add clear roles/responsibilities and timelines after foundational research is completed.

**Strategy 1:** Champion accessible, experiential, content-laden outdoor education programs (formal and informal).

Tactic 1A: Provide direct funding for outdoor education experiences.

Action Item	Who	By When	Resources Needed
Prioritize grants for public Outdoor School programs based on two criteria: 1) ability to drive improved educational curriculum; and 2) contribution to scaling up the number of children benefitting.			
Increase grants for alternatives to formal Outdoor School (e.g., nonprofit-led programs, after-school charter programs) based on two criteria: 1) ability to drive improved educational curriculum; and 2) contribution to scaling up the number of children benefitting.			
Repurpose 5% grant set-aside for individual grantee evaluation to GFF researching collective impact of its grantmaking.			
Continue grants for camp maintenance.			



Clarify and publish grantmaking criteria so applicants are clear whether they are a good fit for funding before spending time applying.			
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Tactic 1B: Develop intentional curriculum for outdoor education experiences to drive effective content delivery.

Action Item	Who	By When	Resources Needed
Be more deliberate / controlling on curriculum / content to ensure it's advancing core purpose / solution statement.			
Explore repurposing current budget set-asides for Geography Education for outdoor education experiences that use geography as a lens.			

Tactic 1C: Invest in teachers who can be environmental champions and change-makers.

Action Item	Who	By When	Resources Needed
Provide grants for professional development.			
Provide outdoor education fellowships.			

**Strategy 2: Inspire action to protect our environment (political action, personal behaviors, and civil discourse).**

Tactic 2A: Advocate for policy changes that will build strong environmental stewardship in generations of Oregonians, and inspire them to keep their communities, natural and built, healthy and intact.

Action Item	Who	By When	Resources Needed
Educate policymakers on the importance of outdoor education experiences.			
Conduct education campaigns and direct lobbying to bring outdoor education to scale to			

ensure access for every youth in Oregon.			
Clarify which policy advocacy priorities exist for Gray Family Foundation, aside from outdoor education, and what level of investment the Foundation will make (leadership role, supporting role, sign-on role).			
Conduct education campaigns and direct lobbying for environmental policy protections and development.			
Conduct research and analysis to “watchdog” legislative activity to anticipate upcoming attacks on environmental policies and regulations.			

Tactic 2B: Advocate for personal behavior changes that reflect Oregonians’ care for their communities.

Action Item	Who	By When	Resources Needed
Provide grants to educate and encourage behavior change that benefits the environment and people’s communities.			
Conduct direct communications campaign(s) to educate and encourage behavior change that benefits the environment and people’s communities.			
Engage in partnerships with nonprofit organizations that can help spread the message about behavior changes to protect the environment and communities.			

Tactic 2C: Provide a forum to promote civil discourse on environmental issues.

Action Item	Who	By When	Resources Needed
Host capacity-building workshops to build skills on integrated thinking, listening, multi-			

cultural engagement.			
Facilitate or co-host forums or summits to allow diverse special interests and diverse participants to discuss the environment and what can be done to conserve it.			

**Strategy 3:** Hook into bigger opportunities beyond our own domain and knowledge that hold the potential to create environmental stewards (incubator research, PRIs, coalition-building).

Tactic 3A: Conduct research on how to inspire and maintain broad and diverse participation in environmental policy development and stewardship, and the relative role of outdoor education. (See “Bike Rack” section for an initial take on potential research questions to explore.)

Action Item	Who	By When	Resources Needed
Amalgamate existing research to understand the economics of outdoor education, the state of natural resources and environmental ethics in Oregon, best practices from outdoor education programs in other states, etc.			
Conduct research with primary audiences to understand what needs/ values exist in communities that would feed action, what programs would be designed to meet these needs, what messages would be the right ones to communicate those values and programs to inspire communities to take action, etc.			
Conduct information-gathering sessions with policymakers to cultivate them around the importance of outdoor education and to surface ideas/ values/ paths to funding it.			

Tactic 3B: Tap into funders network to advance learning, content sharing, and partnerships that leverage resources.

Action Item	Who	By When	Resources Needed
Host a convening of funders to discuss best practices, curriculum and leaders in the arena of environmental education.			
Attend convenings, meetings, and conferences of other funders to learn what they are doing to advance environmental stewardship as a priority for Oregonians.			
Leverage Gray Family Foundation funding through collaboration with other funders to advance annual GFF priorities.			

Tactic 3C: Tap into non-funder network of outdoor education and environmental advocacy and service organizations to support movement-building efforts.

Action Item	Who	By When	Resources Needed
Continue to invest in the Friends of Outdoor School Coalition to broaden the discussion about environmental education and diversify the groups participating (e.g., Latino communities, other funders, GFF grantees).			
Build an advisory group of diverse Oregon leaders, think tanks, and researchers to help inform, advance and analyze research into what builds and maintains environmental stewardship.			

## Budget Considerations

→ FOR FURTHER DISCUSSION: The board and family council are receptive to a more aggressive spend-down plan, but not without a clear vision for why. Various retreat participants suggested where adjustments could be made as noted below. ACTION ITEM: Upon agreement of strategic direction, Gray Family Foundation to facilitate a budget discussion that supports the strategic plan.

	2014 Budget	Adjustments (suggested by whom)
Grants*	\$ 1,755,000	
<i>Geography</i>	\$ 225,000	Cannot change
<i>Camp maintenance</i>	\$ 455,000	Cannot change
<i>Outdoor school</i>	\$ 375,000	
<i>Field trips</i>	\$ 170,000	
<i>Professional development</i>	\$ 205,000	
<i>Other</i>	\$ 120,000	
<i>Special initiatives</i>	\$ 205,000	
Lobbying	\$ 20,000	Increase (Joan)
Communications	\$ 18,000	
Coalition-building/ advocacy	\$ 10,000	Increase (Joan, Dave)
Impact investments/ PRI	\$ 50,000	
Research		Increase
Evaluation	\$ 10,000	Decrease (Janet); Remove 5% allocation from grants (Eric); Maintain (Nick)
Personnel and ops	\$ 340,000	
Convening	\$ 25,000	Increase (Jack)
Technical solutions		
<b>Total</b>	<b>\$ 2,228,000</b>	

\* "Grants" includes \$85,000 in evaluation set-aside (5% of each grant) not captured in separate "evaluation" line item.

## Bike Rack

- Tracy Price did presentation for legislators on why Outdoor School is important. Worth seeing.
- 2013 Values and Beliefs Study identified that the only shared value/theme across all Oregonians is appreciation for the environment.
- Research considerations:
  - If we want broad and diverse participation in environmental policy development, what values exist in communities that would feed that action, what programs would be designed to meet these needs, what messages would be right to communicate those values and programs to get communities fired up and advocating...?

### *Specifically:*

- What does “experiential, outdoor education” mean outside the bounds for formal Outdoor School?
- Who isn’t at the table yet, who should be? What would compel them to get them engaged?
- Clarify the economics: cost per outdoor school, field trip, “experience” per student, relative ROI, and compare options we could be using to get kids outside
- What could I tell a legislator to connect outdoor school to something a legislator cares about, like jobs
- Natural Resource State of the State: Snapshot of existing data on water quality, land use laws, etc. (environmental health of the state)
- Given the considerable challenge of marshalling \$15M in new state funds for outdoor education, and protecting it every year, are there other strategies for raising this revenue (e.g. lottery dollars, corporate kicker, selection on state income tax return, share of corporate tax refund, etc.)
- What are other states doing that have strong outdoor/experiential education programs (e.g. Washington, Colorado, etc)?
- Losing Connection: Is there a breakdown of environmental ethics and what does that mean? Is it true that everyone gets outside once a week or is this not true?