

## Florida Oceanographic Society Strategic Plan 2019-2024

Revised: February 25, 2019

### **Overview:**

The board of directors established a Strategic Planning Task Force in summer 2018, charged with developing a viable long-term Strategic Plan that will make best use of the major facilities expansion. This Strategic Plan creates a roadmap for the next five years and provides a deliberative, disciplined framework for fundamental decisions and actions to shape the organization's future.

### **Mission and Vision:**

A renewed Mission and Vision are the roots on which the Plan will grow. They reconfirm Florida Oceanographic's inspiration and commitment combined with fresh ideas for this new day.

### **Core Values:**

Our Core Values are unambiguous principles stating what we believe and how we will achieve our Mission and Vision. They guide every decision at every level of the organization.

### **SWOT Analysis:**

This focused analysis of our strengths, weaknesses, opportunities and threats guided development of Key Strategies for the Plan.

### **Vision Statements:**

Within the Vision, eight solemn charters provide the opportunity areas where we can lead.

### **Key Strategies:**

The Mission and Vision set the path and the Key Strategies turn our ideals into actions. Senior staff developed and are committed to them.

### **Tactical Goals:**

These tasks and tactics will provide discipline and accountability while driving the Plan forward with meaningful results.

### **Tracking:**

The Strategic Plan Task Force will ensure the realization of the Plan and provide the Board of Directors with continuing reports on its effective implementation.

## Mission

*To inspire environmental stewardship of Florida's coastal ecosystems through education, research and advocacy.*

## Vision

By the year 2024 Florida Oceanographic Society will be a recognized leader in the State of Florida for environmental education, research, conservation and advocacy and will have a national identity through:

### 1. Education

Providing educational programs, exhibits and facilities that engage all ages to create a deeper understanding of and appreciation for Florida's coastal ecosystem with the goals of igniting a passion for environmental stewardship and creating increased respect for our environment and its inhabitants.

### 2. Research and Restoration

Delivering active research and restoration programs that are aimed specifically at improving the health of coastal ecosystems, increasing our knowledge and understanding of marine and estuarine organisms, and advancing our educational mission.

### 3. Facilities

Creating a sustainable and ecologically healthy Coastal Center and properties that support education, research, conservation and advocacy.

### 4. Animal Care and Life Support

Designing of ethical animal exhibits that are managed with a commitment to superior long-term care, leveraging exhibits to support education and research objectives.

## **5. Advocacy**

Providing leadership and expert advice locally, statewide and nationally on ecological policy, current ecological questions, and management of Florida's coastal ecosystems. Being the voice of coastal ecological conservation and being widely recognized as such. Advocating for collective and individual stewardship of the environment.

## **6. Sustainability**

Maintaining fiscal sustainability through robust development activities that include growth in membership, grants, major gifts, endowment fund and visitation to the Coastal Center.

## **7. Human Resources**

Attracting, developing and retaining professional staff with the education and experience necessary to achieve organizational goals and a dedicated, well trained cadre of volunteers to support operations and carry our message to the community at large.

## **8. Community Engagement**

To provide the community with opportunities to engage in our mission.

## Core Values

We believe in learning and understanding all we can about Florida's ocean and coastal ecosystems.

We believe in educating children and adults about Florida's ecosystems in an exciting and interactive way.

We believe in helping visitors to enjoy and learn from their experiences at the Florida Oceanographic Coastal Center.

We believe that our approach to work is built on respect for one another and teamwork, including all employees and volunteers, creating a good workplace and allowing work to be exciting and fun.

We believe in providing the best possible care for all living plants and animals within our exhibits.

We believe in being good stewards of all the material and financial resources made available to us.

We believe that our activities and actions should encourage others to be better stewards of Florida' ocean and coastal ecosystem.

We believe in restoring ecosystems through hands-on conservation and restoration work.

We believe in providing sound, fact based scientific information on issues affecting our coastal environment.

## SWOT ANALYSIS

### Strengths

- Positive, long, local history and positive reputation
- Recognized technical expertise based on science
- Dedicated staff and volunteer support
- High-profile Executive Director
- Both organization and coastal center property in good location
- Inherently sympathetic mission
- Committed core donor base
- Recognized contributor to research and restoration
- Strength and commitment of Board of Directors
- Seen as a draw outside our local area
- We are the science behind the advocacy
- Seen as non-political, but a source of education for political leaders on the science behind the issues
- Our core work is most important for the community now and for the near future

### Challenges/Weaknesses

- Lack of growth in donor base
- Lack of growth in facility attendance
- Potential for staff burn-out with aggressive plans/programs
- Inadequate income
- Insufficient endowment fund
- Current branding of individual people rather than organization
- Weak definition of donor demographics
- Weak definition of visitor demographics
- Advocacy relevance may be tied to crisis situations rather than sustainable environment efforts
- Failure to monetize advocacy activities
- Under promoting the broad scope of our activities
- Facilities need updating and or renovation
- Effectiveness of volunteer Program
- Give safety an increased priority
- Not promoting advocacy well
- Current branding is too narrow

## Opportunities

- Position current/new building assets to reach larger audiences
- Develop new revenue streams
- Establish educational program credentials through collaboration with scientific and educational organizations
- Expand partnerships with other area attractions to increase attendance
- Partner with high visibility organizations to increase market penetration (H.S, Boys and Girls Club, River Kids)
- Increase visibility of the organization beyond the local area
- Expand endowment, planned giving and legacy gift programs
- Pursue grants more effectively
- Leverage new facilities for fund-raising and revenue generation projects
- Leverage research projects to enhance education and advocacy opportunities
- Broaden advocacy beyond water issues; recruit a small, well informed cadre of environmental advocates
- Leverage technology to reduce dependence on staff and volunteers, e.g. presentations
- Develop strategic alliances with other environmental organization; i.e. Loggerhead, Harbor Ridge, etc.
- Develop alliances with corporate partners on environmental advocacy initiatives
- Add community education programs to expand education i.e. learn to fish, birding, environmental education certifications, art, etc.
- Increase on-line giving
- Expand definition of advocacy to focus on personal stewardship
- Make more effective use of our website
- Develop alliances with organizations that represent children and young adults to promote environmental stewardship and conservation
- Develop use of social media
- Pursue increased charitable giving because of recent tax code changes

## Threats

- Losing touch with local and seasonal supporter interest
- Public loses interest in never-changing exhibits and presentations
- Failure to maintain par with other area attractions
- Visitor perception of inadequate or substandard facilities
- Lack of succession plan for key staff
- Vulnerability of facility to natural disaster
- Potential downturn in the economy, reduced giving/membership
- Competing with other advocacy organizations
- Costs outrunning income
- Turnover in key staff
- Increased staff costs due to turnover, government mandates or both
- Changes in tax laws regarding charitable giving
- Animal rights activism
- Potential new legislation that could negatively affect our operations

## Key Strategies

### Vision 1 – Education

- 1.1 Create and deliver world-class daily educational programming at the Coastal Center.
- 1.2 Increase education outreach through presence at public events and in local media.
- 1.3 Utilize property and buildings to their fullest practical educational potential.
- 1.4 Increase adult education opportunities.
- 1.5 Develop and maintain contemporary, regionally relevant educational exhibits.
- 1.6 Make greater use of technology to expand educational opportunities and reach a wider and more diverse audience.
- 1.7 Strengthen partnerships with local schools and teachers.
- 1.8 Leverage investment in research projects to expand educational opportunities.
- 1.9 Increase youth educational offerings.

### Vision 2 – Research and Restoration

- 2.1 Develop, expand and manage relevant and timely research programs focused on understanding and restoring Florida's coastal ecosystems.
- 2.2 Develop Research and Conservation Partnerships with like-minded agencies, educational institutions and organizations.

2.3 Develop and support research and conservation opportunities at high school, undergraduate and graduate levels.

2.4 Actively develop and participate in conservation and restoration activities focused on Florida's coastal ecosystems.

2.5 Contribute knowledge and understanding to the scientific community through publication of scientific papers and presentations at symposiums.

### **Vision 3 – Facilities**

3.1 Develop and implement a time-phased facilities expansion plan.

3.2 Establish and execute capital acquisition and financial sustainability programs.

3.3 Improve and expand use of properties in general.

3.4 Maintain and operate properties in a sustainable, environmentally sensitive and cost-effective manner.

### **Vision 4 – Animal Care and Life Support**

4.1 Align with all relevant and appropriate AZA standards and guidelines.

4.2 Design and operate quarantine and life support systems for sustainability and ethical management of living organisms.

4.3 Continuously improve live animal exhibits.

4.4 Develop and create new and or revised living exhibits with a focus on Florida's coastal ecosystems.

### **Vision 5 – Advocacy**

5.1 Provide policy positions to federal, state and local agencies on ecological questions concerning Florida’s coastal ecosystems.

5.2 Publicly advocate for responsible ecological stewardship through media, public forums and Coastal Center programming.

5.3 Maintain a strong voice among like organizations in support of responsible ecological management.

5.4 Sustain state and national recognition for the organization as a leader in ecological and conservation issues.

5.5 Establish alliances and partnerships with other organizations to take positions on topics affecting the environment.

5.6 Attract, train and mobilize spokespersons/champions for various aspects of coastal conservation beyond just water issues.

### **Vision 6 – Sustainability**

6.1 Expand and execute capital campaigns to develop facilities and programs that further our mission.

6.2 Plan and execute an endowment program to create long-term operational stability.

6.3 Manage and expand our existing funding sources.

6.4 Develop new revenue streams to support growth and sustainable operations.

6.5 Pursue grant opportunities.

6.6 Increase visitation-related income at the Coastal Center.

### **Vision 7 – Human Resources**

7.1 Develop a succession plan for key staff

7.2 Attract, develop and retain a qualified and diverse staff.

7.3 Maintain a contemporary volunteer program with emphasis on recruitment, training and retention.

7.4 Encourage retention of staff through evaluating employee benefits, continuing education and team building.

### **Vision 8 – Community Engagement**

8.1 Build awareness and adoption of Florida Oceanographic’s mission and vision in the community.

8.2 Offer opportunities for volunteer and public engagement.

8.3 Develop partnerships and community relationships with other like-minded organizations and influencer