



# Lake Erie Nature & Science Center

## **Strategic Plan** **July 1, 2021 – June 30, 2024**

### **Mission**

To educate and inspire all of us to understand, appreciate, and take responsibility for our natural world.

### **Vision**

To give every child and adult the opportunity to make a lasting connection to the natural world and to build a lifelong passion for discovery.

### **Values**

1. We value the education of young children to build on children's inherent curiosity and support their social, physical, emotional and academic development.
2. We value the energy of young adults and encourage their potential by expanding opportunities for them to explore their future.
3. We value wildlife rehabilitation for the primary purpose of educating the public and inspiring acts of conservation and compassion for all life.
4. We value astronomy and space science, animal programs, and nature education for the primary purpose of educating the public of all ages.
5. We value science as demonstrated by our organizational culture, individual actions and purpose of our programs.
6. We recognize climate change as a global issue and our organizational role in educating the public using Climate Literacy Principles.
7. We value and respect people's differences in age, color, ethnicity, ancestry, sex, family or marital status, gender identity or expression, language, national origin, physical and mental disability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, citizenship status, and other characteristics.
8. We recognize that every employee is responsible for inclusion, and ensuring that the organization's mission is accessible and relevant to everyone.

### **People**

1. Cultivate leadership development by supporting participation in peer networking, credential programs, and conferences to support employees in their field - measure by hours, and aligned with organizational needs and individual plans
2. Provide workshops or training sessions for all employees to build on culture of visitor experiences, to learn ways to be more welcoming to all, and to support public communication strategies – at least 2 all staff workshops in FY 2023
3. Celebrate the organization's in person culture with more frequent staff gatherings



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4. Build on the wildlife internship program and the new astronomy internship program by adding experiences to learn about the overall mission, and by adding structured feedback sessions

### Programs

1. Animal programs for children and the public to increase includes all ages programs (such as Wonders of Wildlife), creating new programs following new standards of presentation and animal handling; and presenting animals at seasonal family events, field trips, scouts; Animal programs for middle school and high school students
  - a. Staff presenting programs using animals trained by new Animal Program Specialist position– yes/no
  - b. 1 new program created FY 2022 – done Wonders of Wildlife
  - c. 2 new programs created FY 2023 – FY 2024
  - d. Attendance at new programs at or above 50% measured over 1 year
2. Exhibits plan integrating public enjoyment/interaction and program use
  - a. Exhibit signs informed by new Animal Program Specialist position – yes/no
  - b. Exhibit decisions and planning informed by public goals – yes/no
  - c. Exhibit plan created by FY 2023
3. High school program providing well rounded experience in astronomy, natural history wildlife
  - a. Pilot a program in FY 2023 – FY 2024
4. Climate science education and watershed/Lake Erie educational programs Integrating with Integrating astronomy, natural history, wildlife; Supports partnership with Ohio Sea Grant for programming and exhibits
  - a. Pilot a program in FY 2023 – FY 2024
  - b. Conduct 1 program or exhibit with Ohio Sea Grant in FY 2023
5. Astronomy internship college level and/or high school
  - a. At least 1 high school student experience in FY 2022 or FY 2023
  - b. At least 1 college level internship in FY 2022 or FY 2023
6. Preschool programs utilizing new classroom, add classes, also begin offerings on Saturday
  - a. Program for preschool age children in new space expands participation
  - b. New program for preschool age children utilizes former space
  - c. Schedule at least 1 Saturday offering beginning FY 2023



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7. Young adult program (such as college level internship) with wildlife improves with student education in all areas of wildlife and natural history
  - a. Students experience animal care, animal programs, data science, exhibits, wildlife rehabilitation, public presentations – yes/no
  - b. Identify three ways to expand wildlife/animal based internship in future years with additional students or new internship format
8. Wildlife programs utilizing new Wildlife Gardens exhibits, improves public education and awareness
  - a. Program planning begins when project is 75% to fundraising goal
  - b. Planning process identifies staffing resources needed to conduct programs
9. Achieve relevancy and inclusiveness for all audiences includes variety of races and culture, and people of all abilities
  - a. Employees participate in training for increased awareness about program relevancy for all audiences – at least 1 session in FY 2023
  - b. Achieve All Means All standards for programs (Cuyahoga County Board of Developmental Disabilities) by FY 2023 and access their services
  - c. Develop partnership with an institution/school/organization serving low-income children to reach a more diverse audience – by FY 2024

### **Place**

1. Increase overall accessibility with improvements to building, operations, and programs, utilizing ADA survey completed by the park in 2019, and CCBDD All Means All standards.
  - a. Achieve All Means All Standards by calendar year end 2022
  - b. Provide training and resources for front line employees to handle accommodation requests by FY 2023
  - c. Complete 4 items on ADA survey by FY 2024
2. Update capital facility plan to improve enjoyment, safety, and access for visitors, employees, and volunteers. Includes scheduled maintenance, vendor contracts, and planned replacements and repairs for roof/HVAC and other major building components.
  - a. Review and update capital plan twice per year including cost estimates and project expenses
  - b. Adopt an RFP procedure/policy by FY 2024
  - c. Publish and circulate prioritized list with Finance Committee, includes 10 year capital plan summary



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3. Plan, fund, and implement capital projects to advance Center mission
  - a. Renovate former retail space to a program area following building code, raising funds from community, and fulfilling legal obligations with the park district per license agreement – by Fall FY 2023
  - b. Establish plan to replace digital projection system in the planetarium that will serve all astronomy and space science programs for young children, families, and young adults – by FY 2023
  - c. Create an indoor exhibits plan focused on public interaction with animals including use of exhibits for all programs; include renovation of the tide pool (see Programs)
4. Monitor conditions of the Wildlife Gardens during ongoing fundraising efforts, and make repairs or replacements.
  - a. Repairs and replacements to not exceed \$50,000 before project is launched
  - b. Obtain revised quote from selected contractor when 90% of funds are raised
  - c. Achieve 75% of funds raised \$1,125,000 by calendar year end 2023 including pledge commitments

## Prosperity

1. Determine the best mix of operating income among philanthropy (donations and private grants), earned income (program and class fees), and distribution from the Endowment (investments)
  - a. Philanthropy (includes government grants) and Earned Revenue (includes trusts) at near equal percentages +/- 5%; grow Endowment percentage; FY 2022 Forecast: Philanthropy 37%, Earned 32%, Endowment 9%, Other (in kind building, investment income) 22%
  - b. Measure unrestricted income as a percentage of budgeted income, do not measure investment income
  - c. Increase all revenue sources at similar pace to advance mission
2. Philanthropy sources of revenue and goals for donations, private foundation grants, corporate contributions, fundraising events move towards Giving USA benchmarks
  - a. Operating/Unrestricted Amounts to fulfill budget expectations in year 1: FY 2023 Unrestricted Individuals 43%, Foundations 35%, Corporate 7%, Events 0; Government 16%
  - b. Restricted/Project Amounts in sections below
  - c. Increase towards national standard per Giving USA by 10% by FY 2024: Unrestricted Individuals 45%, Foundations 36%, Corporate 7%, Events 0; Government 12%



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3. Raise capital funds to support Place goals
  - a. Program Area Project goal \$50,000, revised cost \$54,000: Raise funds until goal is met, or until September 30
  - b. Wildlife Gardens Education and Renovation Project goal \$1,500,000: Raise funds measured by percentage benchmarks to qualify for grant applications; Maintain goal and phase renovations, focusing on critical areas and public benefit and student education, rather than aspirational vision
  - c. Fund internal accounts
    - Operating cash attain/maintain 3 to 4 months or 6 months \$600,000, funded with excess operating funds through FY 2024
    - Operating reserve attain/maintain \$100,000, funded with excess operating funds by FY 2023
    - Capital account – internal attain/maintain \$300,000, funded with excess operating funds by FY 2024
  - d. Establish plan to replace digital projection system in the planetarium that will serve all astronomy and space science programs for young children, families, and young adults – by FY 2023
4. Raise Endowment funds to sustain mission for the long term
  - a. Aim for \$10,000,000 in fund assets by FY 2026 measured by outright donations, bequests, and bequest intentions
  - b. Calculate expected income growth and donations needed for goal
  - c. Case for support created by calendar end 2022
5. Determine how earned income goals can be tracked to cover program expenses and staffing costs
  - a. Aim for a percentage of coverage due to mix of revenue needed for overall mission delivery; Calculate direct costs (personnel, supplies), indirect cost (facility, support services; Measure using auditors' calculations (Form 990, Part III)
  - b. Assumes: general admission remains free of charge, wildlife rehabilitation services continue which cannot be fee based, number of exhibits indoors and outdoors remain constant
  - c. Utilize online solution/database to measure key performance indicators such as participation percentage of offerings, tracks public participation in fee based programs and pricing trends
6. Improve ratio of organizational expenses on mission delivery and programs



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- a. Achieve 75% or greater percentage of functional expenses on Programs, as measured and reported on the financial statement and form 990
  - b. Ensure a plan to maintain or improve ratio for subsequent years
7. Increase employee's use of and training on Blackbaud's Altru
- a. Use and training will result in the ability to generate data and reports that measure, compare, and analyze program offerings, visitor participation, and fundraising efforts
  - b. Results will streamline operations, reduce manual tasks, capture more accurate information, and optimize visitor participation and philanthropic support

**Approved by the Board of Directors August 8, 2022**