



# STRATEGIC PLAN

2023 - 2025



Cover Photo: Campers investigating macroinvertebrates along the wet meadow boardwalk at the Alice Ferguson Foundation, Summer 2022.



# Letter from Executive Director and Board President

Dear AFF Community,

In the spring of 2022, we asked the Board to consider engaging in a strategic plan. Among other things, the pandemic made significant changes to our operating budget and our staffing. The end of 2022 also marked the end of a very long capital project where much of our energies and resources were absorbed.

The former strategic plan was published in 2018 with a financial plan spanning the years 2018-2023. This trajectory was thwarted by the pandemic and an unusual period in the stock market.

As we look to the future, we endeavor to look at our successes before and during the pandemic, using this information to move forward and make strategic and purposeful decisions that are in the best financial interests of the foundation.

Thank you to those of you who gave input and made contributions to this plan. Your time and commitment to the foundation is greatly appreciated and will be instrumental in our work going forward.


Sincerely,



Theresa Cullen, Executive Director



Stephen Kim, Board President



*Fifth grade students from Indian Queen Elementary along the Potomac River shoreline, February 2023*



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Photo *Left*: Summer camper playing hide and seek in nature, Summer 2022.



# Executive Summary

*“Most strategic plans lack strategy. What’s needed is strategic thinking, not strategic planning (as it were). Most plans consist of long lists of goals, objectives, tasks, and actions. Powerful strategy should fit on a page or two. Plans fill pages and binders.*

*The purpose of strategy is to define the organization in a unique niche. When this is not done, the organization competes for resources and customers with other, similar organizations. Most organizations have plans; very, very few have strategies.”*

Will Philips, “Why Plans Fail,” Qm2, 1995

This strategic plan is designed to guide decision-making over the next three years (2023-2025) to make the Alice Ferguson Foundation (AFF) more **viable** in the short term and **sustainable** in the long run. It clarifies why AFF exists, highlights what it cares most about and does best as an organization, and provides direction for expanding AFF’s resource engine (funding, support, audience).

The Strategic Planning Framework immediately following this summary distills the plan into two pages, including major goals for 2023-2025. Each section is then described in fuller detail. Ideally, the framework – and the planning process itself – reveals a clarity of purpose that will provide focus and discipline for making decisions, including what TO DO, what NOT to do, and what to STOP doing.

Consultant Dean Krimmel facilitated the process and drafted the plan, working closely with Executive Director Theresa Cullen, a board task force, and AFF staff. The process ran from July 2022 through March 2023 and included telephone interviews with selected stakeholders, a review of AFF documents, literature, and past plans, and multiple site visits.

Some key takeaways from the planning process are worth highlighting:

- AFF’s name, in particular the word “foundation,” is confusing, hindering the organization’s ability to raise money and create a strong brand identity.
- AFF’s expertise in environmental education, and its reputation among long-term constituents, should be leveraged to generate new contracts and revenue streams for services to new segments of its primary audience of school-age children and youth.
- AFF staff and board must embrace “who we are,” and move on from what it used to be, making decisions about what to do and what not to do based on that understanding.
- Hard Bargain Farm should be more open and welcoming for families and the community.
- The AFF board must become more advancement-oriented, working more closely with staff to become AFF’s eyes, ears, and mouthpieces in the region.
- AFF must become more intentional in planning programs and activities, being sure to establish the purpose, audience, outcomes, and impact before moving forward.
- AFF board and staff must become more entrepreneurial, asking “Where can we do the most good and receive the greatest support?”

# AFF Strategic Planning Framework

## Vision / Purpose / Mission

AFF will be the premier environmental education organization in the Potomac River watershed, a clean and healthy region that is home to people and communities fiercely protective of nature.

*Helping people find joy in nature*

Our mission is to inspire environmental stewardship by giving people the tools to understand, appreciate, and protect nature.

## Audience

Our primary audience is school-age children and youth, ages 5-18, and their families living in the Potomac River watershed in Maryland, Washington, D.C., and Virginia. We use the term “primary audience” to mean the people for whom our work has the greatest impact.

We recognize the need to also address the needs of our supporting audience which includes families, educators, school administrators, youth leaders, local residents, and AFF supporters.

*We strive to make a difference in the lives of everyone we serve.*

## We Believe That...

- Finding joy in nature enriches our lives and creates a foundation for environmental stewardship.
- Being outdoors is healthy and fun and should be available to everyone.
- Children have a right to understand, appreciate, and connect with nature.
- Environmental education improves students’ growth and their physical and mental health.
- Connecting to nature helps us find a sense of place, fosters a sense of community, and instills a sense of responsibility and stewardship for the natural world.

## Strategies

These strategies are the primary means by which we realize our vision and help people find joy in nature.

<b><i>Nature's Classroom</i></b> We provide immersive, hands-on, curriculum-based school programs and field study, summer camps, and teacher institutes. Exploring the world around us outside the traditional classroom environment.	<b><i>Joy in Nature</i></b> We nurture a love of place through informal learning and adventure. Deepening the connections that create an obligation for responsible stewardship and conservation.	<b><i>Community Action</i></b> We help individuals and organizations plan and implement trash clean ups, and other programs that make our watershed cleaner and healthier. Creating stronger communities through action.
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## Goals for 2023–2025

We will employ these strategies over the next three years to achieve the following goals. Each year we will establish annual objectives (work plans) based on these goals, starting with 2023.

1. **Programs:** By 2025, we will have a financially balanced year-round school and youth program serving 10,000 students supported by 50% direct pay and 50% grants and contracted services.
2. **Development:** By 2025, we will have a board-supported advancement program capable of raising at least \$1.5M annually, sufficient to meet operating requirements and other needs, and new revenue streams from educational programs, admissions, and partnerships.
3. **Community Programs:** By 2025, we will have the procedures, policies, and staffing in place to open Hard Bargain Farm on a regular basis to people seeking informal learning, fun, and rejuvenation.
4. **Partnerships:** By 2025, we will have strong, mutually beneficial, formal partnerships that support our operations, further our mission, and brand us as a valuable community resource.
5. **Brand Reputation:** By 2025, we will be recognized throughout the Potomac River watershed as a leading environmental educator, as well as a great place to visit, hold events, and support.



*Third grade students from JC Parks Elementary hiking and observing habitats along wooded trails, March 2023*



# Implementing The Plan

## Decision Making

For every major activity, we ask ourselves these questions:

- **Purpose:** Why are we doing this? Does it align with what we do best and care most about?
- **Audience:** Who are we hoping to serve? What do they value and need from us?
- **Outcomes:** What results are we seeking? What are our criteria for success?
- **Experience:** What activities will support our purpose, audience needs, and desired outcomes?
- **Evaluation:** How will we measure our results and use the findings?

We take the following measures to ensure progress toward our goals:

1. **Use the Strategic Plan:** The staff and board consult the plan on a regular basis, making it a part of the organization's standard operations.
2. **Focus on Results:** We regularly measure the impact of our programs and services rather than simply report on our activities.
3. **Break Down Silos:** Each department creates annual work plans aligned with the Strategic Plan and other departmental plans—and collaborates with others to reach organizational goals.
4. **Shared Leadership:** Each of us takes responsibility for the success of the entire organization, for helping our colleagues succeed in their duties, and for accomplishing our own jobs.
5. **Be Accountable:** We assess our progress at the individual, departmental, and organizational level through quarterly and annual reviews.
6. **Take Time to Reflect:** We annually revisit why the organization exists, what might improve our work and work environment, and how we work together as a staff and board.
7. **Update the Plan:** We make changes to the strategic plan when conditions warrant while being mindful of our core principles (vision, purpose, mission).



Seventh grade students from Allegheny County learning in nature at the Allegheny Outdoor School at Rocky Gap State Park, September 2022



# The Plan for 2023–2025

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## Introduction

Strategic planning is a reflective process designed to bring a clarity of purpose and focus that helps leaders instill the discipline required to make decisions that ensure the organization receives the greatest support for doing the most good at what it does best.

The plan for 2023–2025 looks back at Alice Ferguson Foundation’s evolution as a nonprofit, including its nimble response to the challenges of the global pandemic of 2020, to find a path forward that is true to its enduring values and sense of purpose. It is grounded in the belief that to be strategic, nonprofits must:

- Understand what they are best at, care most about, and have the capacity for doing (ongoing, iterative process).
- Invest time, energy, and money into understanding the needs of the people they serve, and what those people value.
- Resist the temptation to be all things for all people. It is okay to do “better” what you already do, once you are confident that it’s the right thing to do for the people you serve.

## An Evolving Organization

Alice Ferguson purchased Hard Bargain Farm (HBF) in 1922 as a place to escape from the city, work on her art and share her home with friends and family. In 1954, the foundation was later created by Henry Ferguson with the encouragement of several neighbors. Henry decided to honor Alice Ferguson by naming the foundation in her namesake after her love of Hard Bargain Farm and her lifelong work here. To this day, the couple’s legacy of land conservation and community continues.

With the influence of its first executive director, G.B. “Bernie” Wareham, and neighbor Roy Belva Jensen, a shift in the late 1960s turned the foundation’s focus toward outdoor environmental education — giving rise to a new sense of purpose that lives on today. AFF offered its first outdoor education program in 1966 through partnership with Prince George’s County School system.

Over time, programs expanded from a small shoreline cleanup at Piscataway National Park to a watershed wide network with 300 sites annually clearing nearly 300,000 pounds of trash. A cooperative program and agreement with the National Park Service began with six core National Parks in Maryland, Washington, D.C., and Virginia, expanding to 17 parks at its peak in 2019.

Along with program expansion came plans for the Potomac Watershed Study Complex. The project began with a collective vision to use the highest level of architectural sustainability on the property. It began with a 2006 building charrette, continued with the completion of the nation’s longest living freshwater shoreline in 2010, and finally, the ground breaking ceremony of Maryland’s only “Living Building” in 2015. AFF completed this longstanding capital project in 2022 with the construction of an outdoor pavilion.

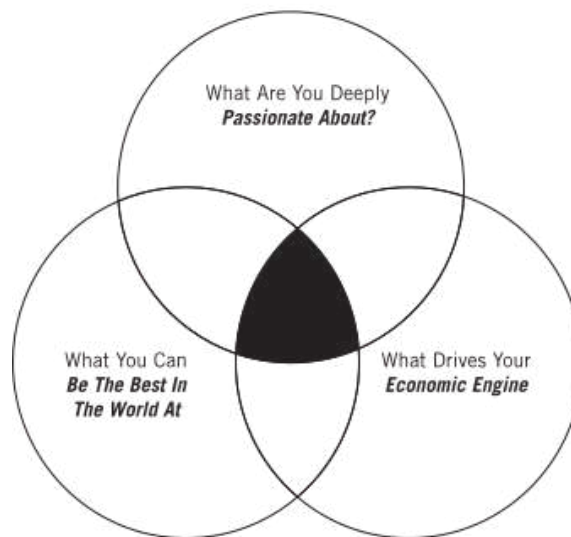
Coming out of the pandemic, with 60 years of environmental education behind it, AFF is facing new challenges.

## Taking Stock: AFF in 2022

The consultant made the following observations early in the planning phase based on his review of AFF's history and conversations with stakeholders, board members, and staff.

1. AFF staff are caring, committed, and optimistic people.
2. The work AFF does is respected and valued by its partners and supporters.
3. AFF is a legitimate pioneer in environmental education and Potomac River clean ups.
4. AFF's partnerships with the National Park Service and schools are models of longevity.
5. AFF must distinguish itself in the face of growing competition from other providers of outdoor environmental education.
6. Over reliance on long running contracts and grants leaves AFF vulnerable.
7. Finding new revenue streams alone is not the answer to becoming financially stronger.
8. AFF needs a friend-raising and fundraising board that supports staff development efforts.
9. Hard Bargain Farm is no longer a working farm. Rather it is a venue for award-winning environmental education school programs and family and community programming.
10. AFF must invest in audience and market research to understand and demonstrate the impact it has on the people and communities it serves.

## Seeking Clarity for the Future



Hedgehog Concept

Copyright © 2001 Jim Collins. Originally published in the book "Good to Great: Why Some Companies Make the Leap... And Others Don't."

1. What are you DEEPLY PASSIONATE about?
2. What can you be the BEST IN THE WORLD AT?
3. What drives your ECONOMIC ENGINE?



*“The essence of the Hedgehog Concept is to attain piercing clarity about how to produce the best long-term results, and then exercising the relentless discipline to say “No, thank you” to opportunities that fail the hedgehog test.”*

Jim Collins, *Good to Great and the Social Sector* (2005:17)

AFF embraced outdoor environmental education more than 50 years ago. Even as it sharpened its educational focus and became recognized for excellence, AFF also tried to maintain Hard Bargain Farm as something of a “working farm.” The current mission statement states that AFF connects “people to the natural world, sustainable agricultural practices, and the cultural heritage of their local watershed through education, stewardship, and advocacy.”

Good intentions aside, AFF’s current mission statement proved too broad and failed to provide a sense of purpose and clarity that is needed to make strategic decisions. For that reason, the consultant introduced the Hedgehog Concept (similar to a model known as “The Three C’s”).

Early in the planning process, AFF staff provided the following insight (below) in an exercise designed to create a Hedgehog Concept for the organization. Caveat: This was the first step in an ongoing process of understanding that will take years to complete. The responses to these questions represent a great start, something to build on.

Do not, for instance, think of competence as being “good” at something. That is not enough as it leads to uncritically doing too many things, to not saying no. Competence must be something AFF can be the “best in the world at.” Like any good tool, the Hedgehog Concept can help AFF find clarity, focus and the discipline to distinguish the organization from its competitors in an increasingly competitive world.

What is AFF deeply passionate about? (Commitment)

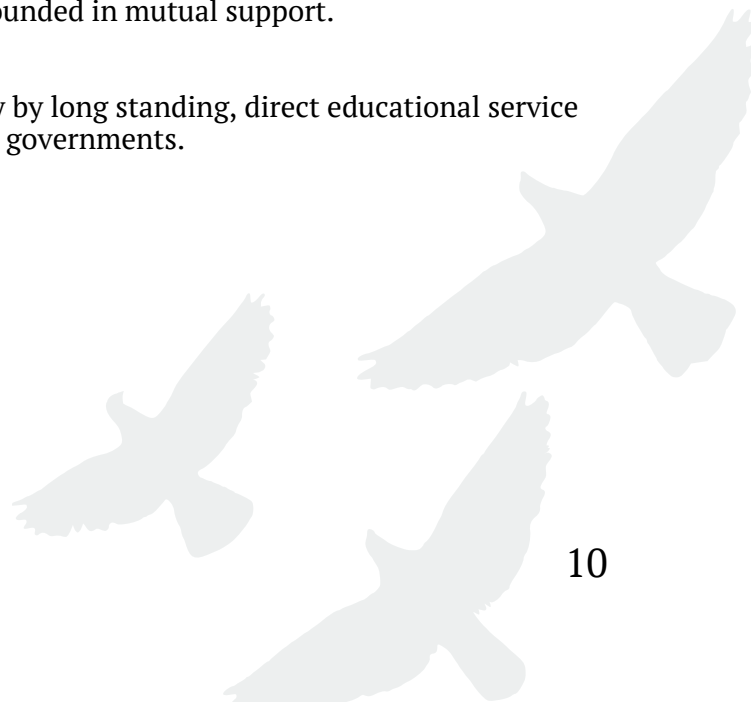
- Reconnecting people to nature and the joy of being outdoors.
- Instilling respect for all living things.
- Providing hope in our ability to protect nature.

What can AFF be best in the world at? (Competence)

- Providing hands-on, experiential, multi-sensory outdoor environmental learning based on our trust and respect for the people we serve.
- Being creative, nimble, adaptable, and tenacious in meeting people’s needs.
- Creating enduring, collaborative relationships grounded in mutual support.

What drives AFF’s resource engine? (Capacity)

- As of 2022, AFF’s resource engine is driven largely by long standing, direct educational service grants and contracts from state, local, and federal governments.



# Vision / Purpose / Mission: Who We Are

## Vision

We envision a future by looking inward at the type of organization we hope to become and by looking outward at the type of community or world we hope to help bring about through our work. The latter should feel audacious, even unreachable. Anything less will fail to inspire our deepest commitment to the people and places we serve.

*We envision a future in which the Alice Ferguson Foundation is the premier environmental education organization in the Potomac River watershed, a clean and healthy region that is home to people and communities fiercely protective of nature.*

## Purpose

We understand purpose to mean the reason our organization exists at its very core. Purpose is eternal, unchanging, and timeless. It provides us with continuity and stability. In *Built to Last* (1994: 76), Jim Collins and Jerry I. Porras remind us that an organization's purpose does not have to be unique. "The primary role of purpose," they write, "is to guide and inspire, not to differentiate."

*Helping people find joy in nature*

## Mission

*"Each social sector institution exists to make a distinctive difference in the lives of individuals and in society. Making this difference is the mission...."*

Peter F. Drucker, *Five Most Important Questions* (2015: 7)

If our purpose is eternal, our mission reflects the foundation's evolution from steward of a beloved community gathering place to provider of transformational outdoor experiences. Since the late 1960s, we have embraced this new way of making a distinctive difference in the lives of the people we serve and the communities where they live.

*Our mission is to inspire environmental stewardship by giving people the tools to understand, appreciate, and protect nature.*

“Students don't get many chances to go outside and explore any more. Being able to see and touch what we are learning helps students to remember and see how Science affects them in real life.” - *Teacher from Rosa Parks Elementary School*





A fifth grade class from Doswell E. Brooks Elementary poses for a group photo during a tour of the property, January 2023

## Audience & Impact: Who We Serve

### Introduction

Peter Drucker (Economy 2015: 20ff) reminded us that nonprofits, what he called social sector organizations, have two types of customers—unapologetically using a business term to describe the people we serve. Your primary customer, he wrote, “is the person whose life is changed through your work.” Our job is to identify that customer. Organizations that do not will “suffer by diffusing their energies and diminishing their performance.” The second type, supporting customers, include funders, partners, employees, members, volunteers, and others who also must be satisfied but in a different way.

Drucker goes on to argue that the “primary customer is never the only customer and to satisfy one customer without satisfying the others means there is no performance.” Effective organizations, he points out, resist the temptation to say we have more than one primary customer. Effective organizations keep the focus on their primary customer.

In our planning, we used audience instead of customer to align with the nonprofit sector, and to avoid sparking arguments over terminology that might prove distracting.

### Primary and Supporting Audiences

AFF’s primary audience—the people whose lives are changed through its work—is school-age children and youth, ages 5-18, and their families living in the Potomac River watershed in Maryland, Washington, D.C., and Virginia. Following Drucker, we believe that a single-minded focus on this audience does not stop our work from having an impact on others.

AFF also recognizes the needs of its supporting audience which includes educators, youth leaders, school administrators, funders, partners, local residents, and AFF members.

*We strive to make a difference in the lives of everyone we serve.*

*"She really enjoyed the camp! We went for a hike the day after camp ended and she had lots of new things to tell us that she had learned."* - Parent of Summer Camp Participant

*"The program exposed students to activities that the majority of students would not have experienced otherwise."* - Teacher from Fort Washington Forest Elementary School

*"My trip was awesome; I got to do and see things I'd never done before. I would like to come back."* - Student from Ludlow-Taylor Elementary School

*"I take my students because it is a valuable hands-on experience, close to home and tied to real data I can show the students from year to year."* - Teacher from Smithsburg Middle School

*"The Foundation has helped us ensure every last one of our fifth graders have the opportunity to have an overnight environmental experience."* - Dr. Monica Goldson, Chief Executive Officer for Prince George's County Public Schools

## What We Believe

*"Children live through their senses. Sensory experiences link the child's exterior world with their interior, hidden, affective world. Since the natural world is the principal source of sensory stimulation, freedom to explore and play with the outdoor environment through the senses in their own space and time is essential for healthy development of an interior life..."*

Robin Moore, director of National Learning Initiative, quoted in Richard Louv, *Last Child in the Woods* (2005: 65)

Our commitment to improving the lives of young people and their families and communities is grounded in a set of beliefs that include the following:

- Finding joy in nature enriches our lives and creates a foundation for environmental stewardship.
- Being outdoors is healthy and fun and should be available to everyone.
- Children have a right to understand, appreciate, and connect with nature.
- Environmental education improves students' growth and physical and mental health.
- Connecting to nature helps us find a sense of place, fosters a sense of community, and instills a sense of responsibility and stewardship for the natural world.





## Making an Impact

*“Nature is often overlooked as a healing balm for the emotional hardships in a child’s life.”*

Richard Louv, *Last Child in the Woods* (2005: 47)

*“Reducing that deficit—healing the broken bond between our young and nature—is in our self-interest, not only because aesthetics or justice depends on it, but because our mental, physical, and spiritual health depends on it. The health of the earth is at stake as well.”*

Richard Louv (2005: 3)

Environmental education programs at Hard Bargain Farm provide students with opportunities to become engaged in real world issues beyond their classroom walls. Students see the relevance of issues such as pollution on our waterways, the effects of water quality on wildlife, and the importance of recycling at play in their daily lives.

Environmental education evokes a sense of wonder and comfort in the natural world, nurturing a sense of respect for nature that lays the groundwork for environmental stewardship. From understanding and appreciation comes a responsibility to protect that which is threatened.

AFF has long recognized the need to equip and empower the next generation of informed citizens and environmental stewards. Young people will inherit a range of challenges – climate change, loss of habitat and biodiversity, stormwater management, among others – that demand an educated and responsive citizenry and community-based approach. Especially in a region as heavily populated as the Potomac River watershed.

Transformative outdoor experiences at Hard Bargain Farm are for many young people in this region the first steps toward a healthier, more hopeful future.

## Strategies: Our Niche

To be strategic is to make informed and disciplined decisions based on your understanding of your organization’s niche—what makes it distinctive and distinguishable from your competitors.

Alice Ferguson Foundation has emerged over the past several decades as an important regional provider of environmental education to school-age children and youth. It has distinguished itself through its stewardship of Hard Bargain Farm, commitment to cleaning up the Potomac River, and investment in the future as exemplified by the construction of a “living building” that is the country’s greenest.

The three strategies described below will surprise no one who is familiar with AFF’s work. These strategies are the primary means by which the organization will realize our vision and help people find joy in nature.

### 1. Nature’s Classroom

**We provide immersive, hands-on, curriculum-based school programs and field study, summer camps, and teacher institutes. Exploring the world around us outside the traditional classroom environment.**

AFF pioneered outdoor environmental education in the Potomac River watershed, beginning in the late 1960s. Learning outside the classroom still sounds novel to some people, despite its structure and alignment with educational goals and outcomes. Teachers, school administrators, and funders, however, recognize that AFF programs combine cognitive and affective learning, using the unique qualities of Nature’s Classroom to deepen students’ understanding, build confidence, and make connections across disciplines.

Looking forward, AFF will utilize this strategy, the cornerstone of the organization, to enhance school programs by extending the time students and teachers spend in nature, increase the number of schools served and teacher institutes offered, and look for new opportunities to serve young people whose lives might be improved by spending time outdoors with expert environmental educators. AFF will also provide access to those unable to visit Hard Bargain Farm through content-rich virtual programs.

## 2. Joy in Nature

**We nurture a love of place through guided activities, informal learning and adventure. Deepening the connections that create an obligation for responsible stewardship and conservation.**

Alice Ferguson found joy, inspiration, and endless creative challenges in transforming Hard Bargain Farm from a weekend retreat into a working farm. She also recognized her role as a steward of the land—and this place in particular where Piscataway people had lived for thousands of years before the arrival of English colonizers.

The foundation created by Henry after her death celebrated Alice’s love of this land and ensured its future as a gathering place for a community the couple helped establish, the Moyaone. AFF leadership’s embrace of environmental education in the mid-1960s, left Henry deeply unhappy. In the decades following Henry’s death, even as AFF emerged as a leader in outdoor education, it tried with varying degrees of success to also function as a “working farm.”

It is time for a change. AFF can “do better at what it does best” over the next several years by finding ways to utilize Hard Bargain Farm not as a working farm, but as a site where people can discover or strengthen their love of the place.

And while the working farm chapter may close, its buildings, fields, and animals will remain. AFF will find new ways to show visitors how the Fergusons reshaped this place—its varied topography, flora, fauna, hydrology—into the distinctive blend of human and natural landscape which then changed over time and continues to change. Visitors will be able to find joy in nature through the arts, outdoor sculpture, games, apps, guided and self-guided tours, QR-coded signage, and, yes, animals.

And AFF will find new ways to interpret Alice’s legacy by addressing the conservation and preservation needs—as well as the interpretive possibilities—of her artwork, the structures she designed, house furnishings, and the Native American cultural material she and others excavated in and around the farm. AFF will work with the Piscataway and cultural heritage professionals on the NAGPRA (Native American Graves Protection and Repatriation Act of 1990) process. AFF will also explore ways of getting help with collections care, management, and interpretation, perhaps by partnering with local graduate programs such as George Washington Museum Studies Program and Corcoran School of the Arts & Design.



### 3. Community Action

**We help individuals and organizations plan and implement trash clean ups, and other programs that make our watersheds cleaner and healthier. Creating stronger communities through action.**

AFF's embrace of environmental education in the late 1960s included concern for the health of local waterways. The foundation quickly emerged as a leader in organizing and hosting trash clean ups in the Potomac River watershed. These efforts inspired dozens of organizations to join in, or form, over the past decades. AFF continues hosting a local annual clean-up, while shifting its attention and resources to the role of teacher/mentor responsible for training and advising others. That commitment to community action will continue in the years ahead, we hope with new sources of funding to support formal training programs, mentoring, web-based information sharing, conferences, and meetings.





## Goals: Five for 2025

*“With strategy one always compromises on implementation. But one does not compromise on goals, does not pussy foot around them, does not try to serve two masters.”*

Peter Drucker, *Managing the Nonprofit Organization* (1990: 66)

We will employ our strategies in pursuit of the goals described below. We will identify annual work plans (objectives) based on these goals, and guided by two questions:

- Where can we do the most good and receive the greatest support?
- How can we create a resource engine that supports what we do best and care most about?

### 1. Programs

By 2025, we will have a financially balanced year-round school and youth program serving 10,000 students supported by 50% direct pay and 50% grants and contracted services.

### 2. Development

By 2025, we will have a board-supported advancement program capable of raising at least \$1.5M annually, sufficient to meet operating requirements and other needs, and new revenue streams from educational programs, admissions, and partnerships.

### 3. Community Programs

By 2025, we will have the procedures, policies, and staffing in place to open Hard Bargain Farm on a regular basis to people seeking informal learning, fun, and rejuvenation.

### 4. Partnerships

By 2025, we will have strong, mutually beneficial, formal partnerships that support our operations, further our mission, and brand us as a valuable community resource.

### 5. Brand Reputation

By 2025, we will be recognized throughout the Potomac River watershed as a leading environmental educator, as well as a great place to visit, hold events, and support.

“

“I am continuously amazed at the work of the Alice Ferguson Foundation. Programs beyond the classroom that activate hands-on learning outdoors and promote careers in science are critical experiences for all of our students here in Prince George’s County, and elsewhere. -  
*Delegate Kris Valderamma  
State of Maryland District 23*

”





summer Campers collecting fish and critters they found while seining for fish in the Potomac River, July 2022



## Further Considerations

This list of ideas to consider emerged from discussions about issues facing AFF, some long standing and others of a more recent nature.

### **Change the organization's name**

The current name makes fundraising, communications, and branding difficult. The culprit seems to be the word foundation, which suggests that AFF provides funding rather than seeks it. Suggestions for a new name include Ferguson Environmental Campus, Ferguson Environmental Center, and Ferguson Environmental Park. Any new name might also include “at Hard Bargain Farm” as a secondary designation. Name changes can be treacherous; getting advice from an outside marketing and communications professional would be wise.

### **Address collections stewardship and repatriation of Native American materials**

Something must be done to address the conservation, preservation, and interpretation of AFF's historical collections which include the Ferguson artworks and historic structures. Ideally, AFF would enlist the help of museum studies and heritage professionals, such as the George Washington Museum Studies Program and Corcoran School of the Arts & Design.

Over the next several years, AFF will work with the National Park Service's National NAGPRA guidelines [National NAGPRA Program \(U.S. National Park Service\) \(nps.gov\)](https://www.nps.gov/nagpra), Piscataway Conoy Tribe, and Piscataway Indian Nation to meet its responsibilities toward the archaeological material, including materials from burial sites, excavated by Alice Ferguson and others in and around Hard Bargain Farm during the 1930s and 1940s.

### **Align your website and social media messaging with the strategic plan**

Assess the website in terms of design and messaging. Better yet, have a communications and marketing professional from outside assess it. Does it clearly communicate what you believe in, your purpose, the benefits of connecting to nature, your vision? Does it help? Or does it harden the silos — environmental education vs. farm programs?

The timeline, for one, is a lost opportunity to showcase AFF as a pioneering environmental education organization. Overhaul it to highlight the evolving nature of the organization. Rewrite it to help staff and board understand your own history—and how the spirit of Alice Ferguson lives on not through the farm and buildings but through the love of the land, curiosity and knowledge seeking, hard work, and shared sense of purpose. So, rewrite it in a way that makes it a meaningful institutional history with periodization that acknowledges the Piscataway, describes Ferguson imprint, and traces changes in AFF purpose from ‘good times place’ to outdoor environmental educator.

### **Reimagine the property**

Embrace the idea that the property is a venue or vehicle for outdoor environmental education and not a would-be working farm. Adopt this mindset as you plan future capital projects and programs. Make changes to the website and literature to reflect this mindset. What would a map of the property look like if it were drawn by environmental educators, naturalists, birders, landscape architects – people attuned to using a place to connect to nature?

### **Embrace your creative side**

Look for more ways to include the arts (e.g., photography, painting, performance, crafts, sculpture, crafts) into the mix, always through an environmental education/nature lens. Could Hard Bargain Farm, for instance, host a curated outdoor sculpture show made up of site-specific installations made from natural or recycled materials?



### **Get help from advisors and mentors**

Form a Teacher Advisory Group to help improve and expand current school programs and the teacher institute. Consider it a way of doing better what you already do well. Find mentors for staff, through a board contact, perhaps, in social media, marketing and communications.

### **Measure your impact**

Do more to evaluate your environmental education programming, including grant-funded research, to understand your audience and demonstrate the impact of your work. It is easier to measure activity than results. The former is important but must never be the sole metric in evaluating our work.

### **Make no piecemeal plans**

Create a long term plan for the property, using an outdoor environmental education lens, rather than make piecemeal plans for individual buildings (e.g., Tool Museum, Shirley and Frank Nicolai Pavilion, Barn).

### **Beware of the promise of heritage tourism**

However tempting it is to pursue heritage tourism as a “strategy,” as defined in this plan, doing so will distract AFF from its mission. Heritage tourism is an important, albeit supporting, component for the organization. Look for ways that keep the environment, nature, and place at the center of all interpretation. That might include working with the Piscataway people to explore their history and relationship with nature. Alice Ferguson’s love of the outdoors, and Hard Bargain Farm as Alice’s canvas for creating buildings, art, community, and fundamentally reshaping the landscape.

### **Establish clear expectations for every partnership**

Create a formal process to guide the development of new partnerships and the evaluation of existing ones. That must include discussions about mutual benefits, expectations, and how to evaluate the results.

### **Leverage your Teacher Resources**

Explore the feasibility of monetizing, or somehow leveraging, the wealth of teacher resources that you generously share on your website. If that proves difficult or unappealing, find out who is using the material and what impact it has on their work lives. At the very least, elicit testimonials that might bolster AFF’s case for support to funders and potential school partners.



*Students from Latin American Montessori Bilingual Public Charter School gathered around the campfire, March 2022*

# Implementing the Plan

## Introduction

*“Planning is often evaluated on the elegance of the decision. What really counts, of course, is the follow through—the implementation. The quality of implementation relates to how the plan was created.... Well-implemented plans achieve the desired results, efficiently, on time, and with few unintended side effects. The secret of good implementation is simple. Implementation requires commitment from all needed to carry it out.”*

Will Phillips, “Why Plans Fail,” Qm2 article, 1995 (Handout retitled “Creating Effective Plans”)

Implementing this plan will require decision making that is focused, disciplined, and intentional. It will require a new mindset and a new way of working together. And it will demand a commitment by AFF staff and board to a shared sense of purpose and vision for the organization and the people and communities it serves.

## Decision Making Protocol

See sample Activity Planning Tool in Appendices

For every major activity, we ask ourselves these questions:

1. **Purpose:** Why are we doing this? Does it align with what we do best and care most about?
2. **Audience:** Who are we hoping to serve? What do they value and need from us?
3. **Outcomes:** What results are we seeking? What are our criteria for success?
4. **Experience:** What activities will support our purpose, audience needs, and desired outcomes?
5. **Evaluation:** How will we measure our results and use the findings?





## Commitment Required

We take the following measures to ensure progress toward our goals:

1. **Use the Strategic Plan:** The staff and board consult the plan on a regular basis, making it a part of the organization's standard operations.
2. **Focus on Results, not Activities:** We regularly measure the impact of our programs and services rather than simply report on our activities.
3. **Break Down Silos:** Each department creates annual work plans aligned with the Strategic Plan and other departmental plans—and collaborates with every other department to reach organizational goals.
4. **Shared Leadership:** Each of us takes responsibility for the success of the entire organization, for helping our colleagues succeed in their duties, and for accomplishing our own jobs.
5. **Be Accountable:** We assess our progress at the individual, departmental, and organizational level through quarterly and annual reviews.
6. **Take Time to Reflect:** We annually revisit why the organization exists, what might improve our work and work environment, and how we work together as a staff and board.
7. **Update the Plan:** We make changes to the strategic plan when conditions warrant while being mindful of our core principles (vision, purpose, mission).

## Setting Objectives: Annual Work Plans

Each member of the Leadership Team will create an annual work plan that supports the goals of this plan and aligns with AFF's vision, purpose, mission, and beliefs.

The Leadership Team includes the Executive Director, Program Manager, Director of Development, Director of Facilities, and Farm Manager.

The Executive Director is responsible for working with the Board of Directors and staff to ensure that the organization reaches its goals for 2025. Each member of the Leadership Team takes responsible for supporting their colleagues to reach these shared organizational goals of:

- A financially balanced year-round school and youth program.
- A robust board-supported advancement program.
- A property that welcomes visitors on a regular basis.
- A partnership program that is strong and mutually beneficial.
- A reputation as a leading environmental educator and destination.

# Plan for an Advancement-Oriented Board

## Introduction

This plan describes methods for increasing board involvement in organizational advancement in support of AFF's plan for 2023-2025. It was crafted by an AFF Board Working Group that included Brian Kane, Dan Donohue, Kate Johnson, Kate Zabriskie, Steve Kim, Theresa Cullen. Planning was facilitated by Dean Krimmel and deeply informed by the work of Development Director Heather Whitpan.

We are using advancement rather than development, as the latter is more narrowly associated with fundraising and the act of asking for money. By using advancement, we hope to broaden the conversation about what constitutes productive board involvement in supporting AFF and open more doors to board participation in expanding AFF's resource engine.

## The Goal

By EOY 2025, AFF will be in a stronger, more viable financial position than it was in 2022, with sufficient resources to ensure its long-term health and ability to weather unforeseen challenges.

1. AFF's resource engine can support annual growth and innovation in programs and services, staffing, professional development, and audience / market research.
2. AFF operates in the black, drawing down no more than 5% of its investments.
3. AFF's board and staff are building a culture of advancement, the board having redefined the role of its members and their relationship to AFF and the communities it serves.



*Board President, Steve Kim, presenting a dedication plaque to Shirley and Frank Nicolai, Board Emeritus and namesakes of the education pavilion, December 2022*

## Why Now?

AFF's reliance on long standing contracts and drawdowns from endowment income has left it vulnerable to changes outside its control and lessened the need to do many of the things that might strengthen its long term financial health, e.g., build new relationships and strengthen current ones, take risks in pursuit of new revenue streams, invest in audience / market research that helps identify new audiences and secure new contracts and funding.

## Leadership Required

- AFF's Executive Director and Development Director and staff must work with the Board President and Executive Committee to lead this effort.
- The Board must "take the lead" in holding its members accountable while also offering direction, training, and support.
- The Board should make clear to potential new board members that organizational advancement is a primary responsibility and expectation of board membership.

## Objectives

To reach its goal, AFF Board and staff leadership will take the lead over the next three years to:

### 1. Rethink Board Governance

- Reexamine and revise board roles, responsibilities (including board giving), expectations, committee responsibilities, recruitment, and onboarding process.
- Emphasis new roles and expectations during the recruitment and onboarding process.

### 2. Create Learning and Training Opportunities

- Make learning a routine part of board life, helping build expertise, confidence, and camaraderie. That might include attending training sessions offered by [Maryland Nonprofits](#) (AFF is a member as of 2023); inviting guest speakers to give brief virtual talks at board meetings; assigning occasional readings for discussion; setting aside time at board meetings for people to share experiences and advice as AFF ambassadors; organizing virtual "case studies" to explore some AFF success stories in attracting funding and other types of support.
- Find out what each board member is comfortable doing, and where they would like support or accept a challenge as agents of AFF advancement.

### 3. Develop a Menu of Options (based on the work of Heather Whitpan)

- Provide a range of ways for board members to "advance the cause." Help each board member identify how to engage with others on AFF's behalf, be they members, stakeholders, community and business leaders, local residents, or funders.
- Create a mechanism (along with the expectation) for board members to document and share their experiences with staff and fellow board members, e.g., quarterly check-in.



*Ambassador (Do you enjoy getting to know others?)*

- Act as AFF rep, in a range of public settings, e.g., community meetings, events.
- Reach out to stakeholders to maintain relationships, learn about issues, needs.
- Attend annual member events, helping with hosting duties.
- Invite people to attend Pinot on the Potomac and other events.
- Make thank you calls to major donors.
- Personalize thank you notes to donors and stakeholders.
- Participate in a Call-a-Thon to connect with lapsed donors.
- Accompany staff on a thank you visit to a major donor.
- Record a testimonial video for use on social media.

*Connector (Do you love bringing people together?)*

- Provide names of individual and corporate prospects.
- Collect other organizations' annual reports, donor lists & programs.
- Recruit new board members with capacity, connections, and passion for AFF mission.
- Identify potential partners, supporters, mentors.
- Help gain access to funding sources, e.g., Earth Share workplace giving.

*Fundraiser (Are you comfortable asking for help?)*

- Contribute directly to AFF, e.g., membership, annual giving, major gifts.
- Learn how to “make the ask.”
- Bring in rentals.
- Sell tickets for events, e.g., buy a table at Pinot.
- Sponsor Pinot on the Potomac.
- Acquire or donate silent auction item donations for Pinot on the Potomac.
- Include AFF in your estate plan.

*Mentor (Do you love sharing your expertise and wisdom?)*

- Advise staff on special projects, e.g., rental program business plan, market research, event planning, project management.
- Provide professional development training in areas of need.

*Other ways of advancing the cause*

- Are there other roles that board members might play?

## **Implementing the Board Plan: Initial Steps for 2023**

1. **Reach Consensus:** AFF board reviews this plan (including the Appendix which follows this section), providing feedback to Krimmel and the Board Working Group. If desired, we can then arrange a virtual meeting to address questions and clarify the intent. To move forward, there should be a consensus – meaning general, rather than 100%, agreement.
2. **Find your Comfort Level:** AFF leadership initiates a process for learning what menu option(s) each board member prefers, including roles that would demand skill building and training. That process might include conversations, surveys, or other means, as long as it does not become cumbersome. Results > Process. Begin thinking about how to build skills and raise the level of comfort across the board.

3. **Embrace Spring Fest:** AFF leadership brings the board into the planning process for Spring Fest, not to micromanage the programming but to model this new approach to board involvement in (and responsibility for) advancement. The board's participation will vary according to members' ability to address staff needs, but every board member might commit to attending as an AFF ambassador. Expectations about what that role entails should be clearly defined and tied to larger goals. Training, including practice in giving AFF's "elevator speech," is a must. And everyone should be asked to provide feedback during the post-event evaluation discussions.
4. **Go Big at Pinot:** Ditto above in terms of modeling a new approach for more board involvement, but tailored to the goals, objectives, and needs of AFF's major fundraiser. Board participation might include hosting potential supporters, selling tickets, securing sponsorships, coordinating the silent auction, and providing hospitality at the event.

## **Appendix: What will it take to become more advancement oriented?**

The questions and answers on the following pages were generated during discussions about what board members might need to become more involved with organizational advancement. They will be valuable in implementing the plan, particularly during the first year.

### **What information do you [as a board member] need to make a case for supporting AFF?**

1. Being able to state a compelling reason for why AFF exists.
2. Being able to describe the impact we have on the students (and others) we serve.
3. Cost per person served (total expenses divided by people -- onsite, virtual, online)?
4. Who else funds AFF? What are the top three?
5. Who do I start with? How to break that barrier with someone who knows very little about the organization?
6. Prince George's county focus vs: Washington, Fairfax, Alexandria City, Charles County.
7. Timing: What is the "right time?" When are people most inundated by fundraising requests, and how does the "AFF cause" differentiate itself?
8. Who else does AFF serve? (Other audiences regionally in addition to students)
9. For outreach to local residents, we need to know the bigger picture: upcoming programs, events, what's happening with the amphitheater. And what impact it has on them.
10. What is the relationship between AFF, AF, and NPS? Why are there so many rules about access? (Anything that helps explain and address misconceptions.)
11. What groups out there share common interests with AFF?
12. More insight into AFF strategy. Who are we targeting for fundraising and friend raising? Where/who are our priorities? What is our development plan?



### **What type of training or skills does the board need?**

1. We need a business case - we may have this and I don't know it. Case for support - knowing what funding is used for.
2. Training on how to 'make the ask.'
3. Where has AFF been most successful in the past?
4. Note that people may have different skills, be better at connecting/cultivating than asking. (Need a closer) How can we think about and utilize the board's mix of skills?

### **What kind of commitment is needed from board members?**

1. The board must push people to get involved and do it. Support each other; hold each other accountable. Give people options, helping them find a way to help.
2. Find what everyone's strengths are and what they feel most comfortable doing.
3. AFF needs to find more people who LOVE environmental education, who have a burning passion for the mission.
4. I believe we need people who are passionate about this organization and its mission. I'm not this person.

### **What might get in the way of the board becoming better at friend raising and fundraising?**

1. Lack of knowledge as to how to do it.
2. Lack of commitment of someone [leadership] to lead/drive the process.
3. The idea/belief that a board development committee is solely responsible for all the work.
4. Not having a fundraising calendar, tangible outcomes.
5. Maintaining momentum. Establishing (realistic) targets, goals, objectives. Continued asks wear people out. Need regular communications, timeframes.
6. Having a sense of direction. Feeling like the goals are unrealistic - losing faith/hope. Feeling like you don't have the skills and training.
7. Other interests (that distract from someone putting in the time and effort).

# Appendices

## Decision Making Tool

For every major activity, we ask ourselves these questions:

1. Purpose: Why are we doing this? Does it align with what we do best and care most about?
2. Audience: Who are we hoping to serve? What do they value and need from us?
3. Outcomes: What results are we seeking? What are our criteria for success?
4. Experience: What activities will support our purpose, audience needs, and desired outcomes?
5. Evaluation: How will we measure our results and use the findings?

<b>Activity</b>			
<b>Purpose</b> <i>(description)</i>			
<b>Purpose</b> <i>(rating: 1-4)</i>			
<b>Audience</b> <i>(description)</i>			
<b>Audience</b> <i>(rating: 1-4)</i>			
<b>Outcomes</b>			
<b>Visitor Experience</b>			
<b>Evaluation</b>			

Purpose

- 4 - aligns with our purpose, mission, vision, goals, and what we do best
- 3 - mostly aligns
- 2 - somewhat aligns
- 1 - doesn't appear to align

Audience

- 4 - serves our intended audience in a meaningful way
- 3 - mostly serves our intended audience
- 2 - somewhat serves our intended audience
- 1 - doesn't serve our intended audience



# **AFF Activity Planning Tool**

## **Introduction**

Please answer the following questions, being as specific as possible. This is a planning tool intended to help us make a decision about whether to move forward. It is not the last word, but rather the beginning of a conversation.

## **Description**

Briefly describe the activity.

## **Purpose**

Why are we doing this?

Does it align with what we do best and care about most? In what ways?

## **Audience**

Who are we hoping to serve?

What do they value and need from us?

## **Outcomes**

What results are we seeking?

What are our criteria for success?

## **Experience**

What do you imagine people are doing?

What activities will support our purpose, the audience needs, and the desired outcomes?

## **Evaluation**

How will we measure our results and use the findings?

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These sources informed the strategic planning process — many of them worthy of revisiting as AFF implements the plan.

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Teriche Blanchard, AFF Board Member  
Dan Donohue, AFF Board Member  
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*\*Special thanks to the Leadership Team*

## Board of Directors

Steve Kim, President\*  
Dan Jackson, Vice President  
Michael Berger, Treasurer  
Teriche Blanchard (emeritus)  
Dan Donohue\*  
Kate Johnson\*  
Brian Kane\*  
Michael Lynott  
Kay Powell (emeritus)  
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Kate Zabriskie\*

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