



SISKIYOU

Field  Institute

Strategic Plan

2021-2023

Table of Contents

BACKGROUND	2
STATEMENT OF PURPOSE	2
MISSION STATEMENT	3
GUIDING PRINCIPLES	3
EQUITY, DIVERSITY, AND INCLUSION STATEMENT	3
ORGANIZATIONAL OVERVIEW	4
A. THE SISKIYOU FIELD INSTITUTE ORGANIZATION	4
B. THE SFI PROPERTY AND HOW IT SUPPORTS SFI ACTIVITIES	4
C. REMARKABLE FEATURES OF THE KLAMATH-SISKIYOU ECOREGION.....	5
D. NEARBY PROTECTED PUBLIC LANDS, WILDERNESSES, AND WILD RIVERS.....	5
E. NEARBY WILDFIRE AREAS	6
HISTORY OF THE DEER CREEK CENTER PROPERTY AND SISKIYOU FIELD INSTITUTE	6
KEY MILESTONES	7
STRATEGIC PLAN	9
COMPETITIVE ADVANTAGE	9
20-YEAR VISIONS FOR FIVE FOCAL AREAS	9
CURRENT VISIONS AND GOALS FOR FIVE FOCAL AREAS	10
1. Community-based Education Programs.....	10
2. Campus	11
3. Staff.....	12
4. Financial.....	12
5. Board of Directors	13
IMPLEMENTATION PLAN WITH TACTICS AND PERFORMANCE MEASURES.....	14
APPENDICES.....	25
APPENDIX A.....	25
Glossary of Terms	25
APPENDIX B.....	26
Strategic Planning Committee and Participants.....	26
APPENDIX C	27
Property Map.....	27
APPENDIX D	28
Property Description.....	28
APPENDIX E.....	28
Sample of Research Projects	28
APPENDIX F	29
Referenced Article Links.....	29
APPENDIX G.....	30
Example of a Decision-making matrix.....	30
APPENDIX H	31
Annual Work Plan for Achieving the Strategic Goals.....	31
APPENDIX I	31
Goals for Consideration in Future Strategy Selection	31

Background

Statement of Purpose

It is with great excitement that the Siskiyou Field Institute (SFI) releases our *Strategic Plan 2021*, which will guide us for the next three years. This *Strategic Plan* was developed by SFI's executive director, staff, and board of directors, led by consultant Tatiana Bredikin of Meeting Mastery. Executive director Sarah Worthington has been appointed as the key champion to carry out the goals described below.

Certainly 2020 brought SFI into a new reality of change, and we made the decision to reflect on what we are doing right, what can be improved, and how we can best serve our region and beyond in the coming years. We are grateful for this reflective experience, and the staff and board relationship became stronger.

Our belief is that the Klamath-Siskiyou ecoregion is incredibly important, as is our role in connecting people to this place through science-based education. We acknowledge that science-based programming is not a one-size-fits-all endeavor. By intentionally feeling and living SFI's mission, we aim to empower individuals to gain knowledge of wild places and science-based environmental research.

This *Strategic Plan* provides a structure for planning, implementation, and internal board/staff accountability. All goals sit upon a bedrock of financial stability and broad community outreach. As we set our sights on increasing SFI's impact on local communities, we will focus on dismantling barriers to equity and access to science-based, outdoor education. SFI will be taking actions to widen our awareness in serving new and existing audiences.

Throughout the creation of this document, it was evident that many hands and hearts got us to where we are. Our gratitude runs deep for the Kendeda Fund, Gray Family Foundation, Cow Creek Umpqua Indian Foundation, Ford Family Foundation, Four Way Foundation, Meyer Memorial Trust, Carpenter Foundation, Gordon Elwood Foundation, Oregon Watershed Enhancement Board, SFI members, and past board members and staff.

As we culminate this process, we have renewed energy for the exciting possibilities ahead and our future partnerships. These are certainly innovative times, and we invite you to visit the Siskiyou Field Institute to get to see firsthand our new projects.

Regina Castellon, SFI Board President
November 21, 2020

Mission Statement

The mission of the Siskiyou Field Institute is to increase the understanding of and connection to the Klamath-Siskiyou ecoregion through education, scientific research, and public engagement.

Guiding Principles

We value:

- Exploration of the mystery and intrinsic value of nature
- Connecting people to place
- Excellence in science-based education and land stewardship

Equity, Diversity, and Inclusion Statement

General Statement:

Siskiyou Field Institute celebrates equity, diversity, and inclusiveness as pillars of excellence that are crucial for healthy people and healthy communities. Like natural systems, human cultures are stronger when they are diverse.

Value Statements:

Our core values are strengthened when:

- all people have a voice and are empowered to contribute;
- SFI participants and guests enjoy a safe and effective learning environment;
- SFI's equity, diversity, and inclusion initiatives reflect a commitment to the health and safety of individuals, communities, and future generations.

Action Statements:

Our core values are realized through actions, such as:

- offering experiences where people with diverse views, cultures, and backgrounds feel safe, supported, heard, and seen;
- expanding staff and board skills to foster an inclusive culture of mutual respect, open-mindedness, and compassion;
- providing welcoming environments that are sensitive to ability, age, culture, ethnicity, gender, gender identity, national origin, physical appearance, race, religion, sexual orientation, socioeconomic background, veteran status, or any other aspect of identity.

Organizational Overview

NOTE: For definitions of terms used in this plan, see the glossary in Appendix A.

A. The Siskiyou Field Institute Organization

The Siskiyou Field Institute is a 501(c)(3) nonprofit organization focused on natural history education and scientific research. SFI is dedicated to connecting people to the Klamath-Siskiyou ecoregion, in partnership with many local, state, and federal organizations and institutions.

Siskiyou Field Institute serves as a conduit for expert scientists and naturalists to share their passion and knowledge with the public, through field courses, events, and youth education programs arranged with regional school districts. In 2019, SFI offered over 40 field-based educational experiences, led by instructors from academia, land management agencies, and the local community. Programs ranged from half-day workshops on SFI's property to multi-day courses in remote areas of the Klamath-Siskiyou ecoregion. Topics ranged from cutting-edge climate science to stalking wild mushrooms.

SFI also supports research scientists and academic institutions in multi-year research and monitoring projects on and near SFI's property. Partner institutions have included University of Oregon, Oregon State University, UC Davis, and Linfield College. SFI is a survey site for the Western pond turtle and Pacific lamprey. See more information on research and monitoring projects in Appendix E.

Curious kids, adventurous teens, developing professionals, research teams, and lifelong learners all come to SFI to study and explore the Klamath-Siskiyou ecoregion, a land of rugged mountains, wild rivers, and world-class biodiversity of species and habitats.

B. The SFI Property and How It Supports SFI Activities

Siskiyou Field Institute is based in Selma, Oregon at its 850-acre property, known as the Deer Creek Center. Embedded in the biologically-diverse Klamath-Siskiyou ecoregion, the property lies north of Eight Dollar Mountain in the Deer Creek and Squaw Creek watersheds, with over a mile of creek frontage.

The expansive acreage, which is primarily undeveloped, is protected by a conservation easement that codifies SFI's commitment to follow science-based management and restoration practices.

The primary structure is the 6,000 square foot Kendeda House. The facility provides overnight accommodations (for course participants, researchers, and the public), a community kitchen, staff offices, meeting areas, and a large classroom with lab equipment. On the grounds are tent camping areas, a solar-powered bath house, picnic pavilion, and two yurts. See Appendices C and D for a map and detailed descriptions of the property and structures.

This biologically unique and beautiful property provides K-12 students, university scholars, and researchers immediate access to the world-famous serpentine landscapes, old-growth forests, and wild rivers of the Klamath-Siskiyou. It is an ideal laboratory classroom for studying soils, forests, streams, and wildlife, with easy access to research sites and teaching locations. Only 18 miles west of Grants Pass, the SFI property enables people in the Rogue and Illinois Valleys to discover an ecological treasure close to home.

C. Remarkable Features of the Klamath-Siskiyou Ecoregion

The Klamath-Siskiyou has a dramatic geologic history and complex topography, due to accretion of ancient seafloor sediments from the Pacific Plate onto the North American Plate subduction zone. Consequently, this region has a high diversity of soil types that grow a remarkable number of plant species.

For example, rare “serpentine” plant communities thrive here, such as Jeffrey pine savannas, serpentine barrens, and spring-fed fens covered with carnivorous pitcher plants (*Darlingtonia californica*). There are an estimated 3,500 plant species, including 35 types of conifer trees and many endemics that grow nowhere else on Earth. The region has been designated as having “global botanical significance” by the United Nations International Union for Conservation of Nature.

D. Nearby Protected Public Lands, Wildernesses, and Wild Rivers

SFI’s property is surrounded by public lands with special protections, such as the Oregon Caves National Monument and Preserve and the Bureau of Land Management’s Eight Dollar Mountain Area of Critical Environmental Concern. Also nearby, the Rogue River Siskiyou National Forest has set aside the Squaw Mountain Roadless Area and two Botanical Areas.

Four federally-designated Wilderness areas are located within a two-hour drive: the Kalmiopsis, Siskiyou, Red Buttes, and Wild Rogue.

Deer Creek is the largest tributary to the Illinois River, a federally-designated Wild and Scenic River. This and other riparian areas provide important habitat for Coho salmon, fall Chinook, Pacific lamprey, and winter steelhead, as well as Western pond turtles and the giant pacific salamander.

E. Nearby Wildfire Areas

The property was on the edge of the 2002 Biscuit Fire, 2017 Chetco Bar Fire, and 2018 Klondike Fire. Half of the acreage in the Squaw Creek drainage was burned and now provides a good example for studying forest recovery following mixed severity fire.

History of the Deer Creek Center Property and Siskiyou Field Institute

Prior to Euro-American settler colonialism, the land was used for millennia by First Nations Peoples, including the Takelma Band of the Rogue River Indians, the Cow Creek Umpqua, and the Tolowa Dee-ni'. These two linked essays give more information: [local Natives](#) and [historic flooding and usage of fire](#), see Appendix F.

After the white settler land grabs of the 1850's, Oregon deeded the first water right for the property to John F. Stevens in 1897. The current boundaries appear to have been created in the O&C Act of 1916. The first name on county records was Wilbur B. Thayer.

Over the past 80 years the property was owned by several people and used as a working cattle ranch. In 1983 it was purchased by Chick Iverson, a famous VW/Porsche/Rolls Royce car dealer from Hollywood. Colorful stories emerged from that era about Mr. Iverson and his best friend and frequent guest, John Wayne.

In 1998, Siskiyou Field Institute was founded and began offering science-based field courses to adults, families, and youth. SFI started as a project under the nonprofit umbrella of Siskiyou Regional Education Project, an environmental advocacy organization based in Takilma.

In 2004 SFI became an independent 501(c)(3) nonprofit organization and was looking for a home. Over a four-year period, the Western Rivers Conservancy and the Keneda Foundation worked together to purchase 850 acres of the property, that led to the establishment of the Deer Creek Field Station and Education Center. Details are provided below.

Key Milestones

- 1997 - Siskiyou Regional Education Project hosted the First Conference on Klamath-Siskiyou Ecology, organized by staff (Kelpie Wilson, Barry Snitkin and Jennifer Marsden) at Illinois Valley High School. Prestigious researchers were recruited to lead field trips and offer classes to scientists and citizens. The enthusiastic response gave rise to the founding of the Siskiyou Field Institute.
- 1998 - Siskiyou Regional Education Project launched the "Siskiyou Field Institute", under its 501(c)(3) nonprofit umbrella, based at the Takilma Community Building. Sue Parrish was hired as the Director.
- 2003 - SFI hosted the Second Conference on Klamath-Siskiyou Ecology at the Dome School in Takilma, attended by over 300 scientists and citizens.
- 2004 - SFI got its own 501(c)(3) nonprofit status.
- 2004 - SFI began to offer field-based natural history courses, primarily in the summer, with some earning credit at Southern Oregon University. Classes were held in the Rogue Community College Belt Building in Kerby, Illinois Valley High School, and Selma Elementary School.
- 2004 - Kendeda Foundation pledged \$3 million in support of the purchase of a facility for field education and research. A partnership was formed between SFI and Southern Oregon University Foundation to further that goal.
- April 1, 2005 - The IRS took possession of the 1000-acre Deer Creek Ranch.
- June 2005 - An agreement was signed authorizing Western Rivers Conservancy (Phil Wallin) to purchase 850 acres from the IRS. The Western Rivers Conservancy project brief link is in Appendix F.
- 2006 - SFI moved its office to the property and launched the "Deer Creek Field Station and Education Center" with its primary partner, Southern Oregon University School of Sciences.
- 2007 - The Deer Creek Center was incorporated as a 501(c)(3) nonprofit, in a joint enterprise between SFI and Southern Oregon University Foundation. The board consisted of representatives from the Southern Oregon University Foundation and two SFI board members. This organization worked with SFI to manage the property and offer field courses.
- 2007 - The first yurt, bathhouse, and pavilion were built.

November 24, 2008 - Oregon Watershed Enhancement Board (OWEB) donated \$500,000 toward property acquisition and placed a Conservation Easement on the property, enabling both the property acquisition and the establishment of a \$1 million operational endowment.

2008 - Title was transferred from Western Rivers Conservancy to Deer Creek Center.

May 2009 - SFI hosted the Third Conference on Klamath-Siskiyou Ecology at the Selma Community Center.

2009 - The second yurt was constructed, spearheaded by Steward Janes of SOU.

2010 - The conservation easement management plan was written and presented to OWEB.

2013 - The ropes course was installed.

June 3, 2014 - The Deer Creek Center Board dissolved, transferring assets and property to the SFI board.

2016 - State of Oregon Measure 99, "Outdoor School for All," was passed.

2017 - The solar panels were erected.

2018 - Snow school began pilot year.

2018 - SFI was base camp for firefighters during the Klondike fire.

2020 - Strategic Planning process was completed.

Strategic Plan

Competitive Advantage

- An ideal facility for outdoor education and scientific research on our beautiful 850-acre property in the heart of the world class Klamath-Siskiyou region.
- 20 years of experience offering natural history education programs for youth and adults
- 20 years of relationships with members, participants, partners, instructors, science researchers, agencies, businesses, and community allies.

20-Year Visions for Five Focal Areas

1. Community-based Education Programs Vision

SFI offers outstanding education and immersive experiences into the natural world by implementing cutting-edge science and instructional techniques. Our immersive science and nature programs feed the mind and spirit as they help students experience and interact with the natural world. SFI's varied and captivating programs mirror the bioregion's diversity of land and people. We embody our values in our programs.

SFI engages with organizations that share our vision and goals. We maintain strong relationships with government agencies, other nonprofits, universities, and regional schools.

Siskiyou Field Institute has an important role in creating a more engaged and empowered citizenry, capable of solving real-world problems and collaborating within their community. Our plan for a reflective community cultivates gratitude for our constituencies and within our organization.

2. Campus Vision

We have an innovative and sustainable campus. Stewardship of our land is exemplary and science-based. Protected by a conservation easement, rare plant communities, grasslands, wetlands, and riparian health are being restored. The SFI campus is a model of sustainable and regenerative development.

We attract and accommodate natural resource researchers with an up-to-date facility. Our secure campus is inspiring, novel, alter-abled accessible, and well-equipped to engage students in learning and nature connection. Kids with special needs are welcome, safe, and free to run wild. Adults with impairments enjoy classes and access to the natural world.

3. Staff Vision

SFI staff are leaders in nonprofit management, marketing, community engagement, environmental science education, nature connection, and ecology. SFI instructors are committed, creative, and skilled facilitators, fostering curiosity to explore, question and connect to science, nature, and each other.

Instructors, program coordinators, land managers, and directors choose SFI for its commitment to community service, program quality, positive staff culture, and opportunities to grow and advance professionally with competitive compensation. Our staff has high retention rates and possession of the tools necessary to fully engage in their work. Staff are developed and challenged within a culture of gratitude that supports professional and personal growth.

4. Financial Vision

SFI has a financially diverse income, sustained through program fees, memberships, private donors, an endowment, foundation contributions, and community support. Our development plan inspires community confidence by prioritizing donor and financial stewardship.

5. Board of Directors Vision

The SFI board is visionary, skilled, and resilient. Members with diverse expertise engage in thoughtful and passionate discussion in partnership with our Executive Director to determine the best path forward.

Participation on the SFI board is desired by active community leaders and those passionate about our mission.

Current Visions and Goals for Five Focal Areas

1. Community-based Education Programs

Community-based Education Programs - Three-year Vision

SFI programs have an excellent reputation and are building strong, positive relationships with local school districts, making SFI the program of choice for outdoor education in Southern Oregon. The strategic development and growth of our youth programs has been successful. In normal years, our Youth Education Program (YEP) offers a year-round schedule that is 60-80% full, supporting instructor retention.

Adult programming has a clear vision. The innovative adult program captures the attention and meets the needs of life-long learners. It includes an ever-increasing array of alter-abled field courses and hikes. The Adult Education Program (AEP) inspires wonder and curiosity in citizen scientists.

Participant evaluations communicate measurable program impacts. We strengthen our reputation and relationships through outreach, evaluation, continuous communication, and being a relevant presence in the community. School program evaluations reflect high student outcomes in 21st-century skills, science education, and outdoor school benchmarks.

SFI continues to build programs that are reflective of community needs for student mentorship, social opportunities, outdoor school, and wintertime opportunities. We innovatively provide access based on identified student needs and prioritize inclusivity by evaluating and removing barriers to participation. We address barriers to access through the establishment of scholarship funds, continuous evaluation of our participants, and responsive programming initiatives.

Current Program Goals

- I. Implement at least one measurable AEP improvement based on community feedback, surveys, or financial data, annually.
- II. Implement at least one measurable YEP improvement based on community feedback, surveys, or financial data, annually.
- III. Engage at least one new school district with SFI day or residential programs by building relationships, marketing, and outreach.

2. Campus

Campus - Three-year Vision

SFI has a thoughtful and attainable campus master plan for restoration and building projects that support program priorities. The conservation values on the property are current and continue to be maintained and fulfilled in compliance with our conservation easement. The campus is transformed as restoration continues, and projects are completed. Our setting is an ideal education and research facility, that also serves as a magnet for productive meetings, contemplative retreats, and festive occasions.

Current Campus Goals

- I. Develop a legal and reliable water delivery and filtration system to meet current and future facility needs and protect our water rights.
- II. Develop a campus facility decision-making framework/comparison matrix for facilities expansions, large infrastructure projects, and restoration priorities that use SFI mission- and values-supporting criteria. See example in Appendix G.
- III. Mandate: Revise and update the SFI/Deer Creek Center management plan in accordance with OWEB guidelines and the terms of our conservation easement.

3. Staff

Staff - Three-year Vision

SFI staff experience employment security, joy, and professional expansiveness, working for an organization that emphasizes values-based work. Staff are attracted to SFI because of the prioritization of a positive workplace culture of growth, evaluation, accountability, community-mindedness, and mentorship.

We value our staff by providing stable, year-round employment, living-wages, and competitive benefits. This environment retains staff on a long-term basis, including a high percentage of youth instructors, which stabilizes, develops, and attains program goals with quality instructional outcomes.

SFI has collected a staff of people who are professional, knowledgeable, committed, and empowered. As a community they make the world a better place.

A consistent funding source for all permanent staff positions is established.

Current Staff Goals

- I. Research competitive wages and benefits and determine target wage compensation goals for all staff positions.
- II. Prioritize a positive workplace culture and operationalize inclusion, as measured by annual score improvements on the SFI workplace culture assessment.

4. Financial

Financial - Three-year vision

SFI has a plan for immediate organizational financial stability, including funding permanent staff positions and current expenses.

Organizational legal stability includes proper permitting for public lands access for programming and restoration projects, as well as proper human resources practices.

The YEP has developed year-round offerings and is working to meet participant goals, thereby providing steady income.

Our fundraising and donor cultivation program is in place. SFI is poised to step into our greater vision.

Current Financial Goals

- I. Develop a financial plan and funding strategy to meet the current 3-year cycle of SFI needs, including a 3-year plan to dedicate the quarterly Keneda endowment interest disbursements to facility and property maintenance, development, and restoration.

- II. Implement a monthly donor stewardship and legacy giving program to establish fundraising and donor retention goals for the 2022 fiscal year.

5. Board of Directors

Board of Directors - Three-year vision

The SFI board is well-organized and engaged, and their potential is maximized. The Board of Directors (BOD) utilizes bylaws and committee charters to promote a sustainable and diverse board, and ensure the efficiency of meetings and decision-making processes.

Opportunities abound for members to contribute their unique gifts. A plan is in place to enlist board members' active participation in events and fundraising on many levels. Succession planning ensures effective, sustainable board membership.

Current Board Goals

- I. Develop committee charters and governance documents, including an antiracism plan.
- II. Develop a recruitment and selection process to ensure incoming board members bring needed attributes, and establish on-boarding procedures to ensure their success and retention.

Implementation Plan with Tactics and Performance Measures

The Board of Directors decided to focus on SFI's highest priorities and immediate needs in this plan, rather than set specific due dates during the uncertainty of these COVID times. An annual work plan for achieving these goals and tactics will be prepared by the executive director who will take the lead on all goals, except those delegated as shown. The work plan and the proposed goals for future consideration can be found in Appendices H and I.

Focal Area	Goal	Tactics	Responsibility
Programs I	Implement at least one measurable Adult Education Program (AEP) improvement, based on community feedback, surveys, or financial data, annually.	<p>Finalize a policy and procedure for electronic evaluation for the AEP.</p> <p>Finalize the draft evaluation format and questions for all AEP.</p> <p>Structure and format the actual survey in Bloomerang.</p> <p>Initiate the surveys and collection of data.</p> <p>Analyze the data collected across one full year after initiation of the surveys.</p> <p>Determine programming areas of interest, based on the data, trends, and areas of improvement (strengths and need) identified in the surveys.</p> <p>Determine the most effective program improvement to implement, based on survey and financial data.</p> <p>Implement at least one program improvement annually, starting in 2021.</p> <p>Capture student experience stories for potential program development, marketing, and fundraising.</p>	

Focal Area	Goal	Tactics	Responsibility
		<p>Develop and present a year-end State-of-the-Program report to the board annually, based on financial and evaluative data from participants. Highlight connections to the Strategic Plan and SFI values, starting Jan. 2021.</p> <p>Build coalitions and educational programs with local tribes and other organizations serving under-represented populations.</p> <p>Consult with field experts and create a best practices framework to initiate outreach to historically underserved and marginalized populations in the community and attract them to participate in culturally relevant programming.</p>	
Programs II	Implement at least one measurable Youth Education Program (YEP) improvement, based on community feedback, surveys, or financial data annually.	<p>Finalize a policy and procedure for electronic evaluation for the YEP.</p> <p>Finalize the draft evaluation format and questions for all YEP.</p> <p>Structure and format the various surveys in Google forms for all residential and day programs.</p> <p>Institute a debrief dinner at the end of residential programs for the solicitation of feedback from teachers, chaperones, and administrators.</p> <p>Initiate the surveys and collection of data.</p> <p>Follow up with schools when a problem has been identified. Resolve with the school and collect that information for potential program improvement.</p> <p>Participate in the OSU Extension provider evaluation every other year, on their schedule.</p> <p>Analyze the data collected across one full year after initiation of the surveys.</p>	

Focal Area	Goal	Tactics	Responsibility
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Determine programming areas of interest based on the data, trends, and areas of improvement (strengths and need) identified in the surveys.

Capture student experience stories for potential program development, marketing, and fundraising.

Determine the most effective program improvement to implement, based on survey and financial data.

Implement at least one program improvement annually.

Create an EDI, ACES, and trauma-informed disciplinary process and policy for YEP.

Develop and present a year-end State-of-the-Program report to the board annually, based on financial and evaluative data from participants. Highlight connections to the Strategic Plan and SFI values, starting Jan. 2021.

Consult with Gilda Montenegro-Fix and develop a relevant survey for parents of children who do not attend residential programs, to understand additional barriers (cultural, additional economic, developmental, etc.), with the intent to mitigate local districts' low percentage of student attendance at Outdoor School (ODS).

Consult with BEETLES for curriculum and site audit, and facilitation of staff and instructor training; then implement YEP learning and teaching recommendations as appropriate.

Programs III Engage at least one new school district with SFI day or residential programs by building relationships, marketing, and outreach.

Seek funding for the outreach and engagement position (approximately 9+ months).

Select and hire a funding-dependent outreach and engagement position.

Develop and implement a relationship, marketing, and outreach plan.

Focal Area	Goal	Tactics	Responsibility
		<p>Re-engage and maintain a regularly delivered newsletter communication to schools.</p> <p>Maintain regular contact with local school districts, identifying improvements that are particular to their interests.</p> <p>Engage with OSU Extension in their outdoor school-oriented programs, which is usually outreach to schools.</p>	
Campus I	Develop a legal and reliable water delivery and filtration system to meet current and future facility needs and protect SFI water rights.	<p>Find, select, and hire a professional water engineering contractor to assist with the initial assessment, project future water needs, and present alternatives with cost of each. (e.g. rebuilding, change point of diversion, etc.)</p> <p>Develop a comparison matrix, with the help of the contractor, to assess our present and future water needs, dependent upon what we do with the facility. Include projected maximum property occupancy, fire safety, and short, medium, long-term irrigation needs.</p> <p>Select the best water delivery alternative to meet anticipated needs.</p> <p>Identify sources and secure funding for the water delivery system of choice.</p> <p>Implement the construction of the water delivery system.</p> <p>Complete construction of the water filtration system.</p>	
Campus II	Develop a campus facility decision-making framework and comparison matrix for facilities expansions, large infrastructure projects, and restoration priorities that use SFI mission- and values-supporting criteria.		

Focal Area	Goal	Tactics	Responsibility
		<p>Determine factors on which to weigh alternatives, including SFI mission and values, cost, multifunctionality, and ADA measures for inclusive experiences.</p> <p>Develop a template matrix using factors identified in the strategic planning process.</p> <p>Test the decision-making framework on procurement of adaptive equipment to prioritize site accessibility.</p> <p>Implement for use and become comfortable with the process.</p>	BOD
Campus III	Mandate: Revise and update the SFI/Deer Creek Center management plan in accordance with OWEB guidelines and the terms of our conservation easement.	<p>Identify sections of the plan that need to be updated.</p> <p>Identify the help needed to update the plan, including professionals required to do the work. (e.g. plant contractor to survey map habitat types and changes to plants/weeds and describe current riparian and desired future riparian zones).</p> <p>Identify funding sources and write proposals to fund the aspects that need to be updated.</p> <p>Review all past conservation easement monitoring reports to identify problem areas and/or areas to focus on.</p> <p>Review and update key aspects of the old plan to carry over to the new plan (e.g. history and fires).</p> <p>Describe the 10-year desired management plans for the property and use of the land.</p> <p>Discuss and consider the Property Desired Future Conditions Map for the human-use zone, including pastures.</p> <p>Prepare the Property Desired Future Conditions Map to include visual, facilities expansion, trails, roads, bridges, and restoration projects.</p>	<p>BOD</p> <p>ED and BOD</p> <p>ED and BOD</p>

Focal Area	Goal	Tactics	Responsibility
		<p>Select and hire contractors for the technical work when funding is available.</p> <p>Select and hire a contractor to prepare the final document.</p>	
Staff I	Research competitive wages and benefits, and determine target compensation goals for all staff positions.	<p>Identify job description, wage, and benefit resources available online for similar positions.</p> <p>Determine the specific discovery questions for consistent results.</p> <p>Gather in-state information on job descriptions, wages, and benefits for similar positions in at least three comparable organizations.</p> <p>Determine regional cost of living and related wages based on locally-adjusted state-wide data for comparable positions.</p> <p>Determine an entry level and current staff salary or hourly wage range, by position.</p> <p>Build a transparent matrix to determine the hiring and current staff wage, including years of experience and other variables.</p> <p>Create a plan to provide a competitive compensation package.</p> <p>Establish a timeline to reevaluate competitive wages.</p>	
Staff II	Prioritize a positive workplace culture and operationalize inclusion, as measured by annual score improvements on the SFI workplace culture assessment.	<p>Solicit staff input on what a "positive workplace culture" includes. Establish what "positive" means.</p> <p>Finalize positive workplace culture and inclusion components, including communication norms, and tools to do the job.</p>	

Focal Area	Goal	Tactics	Responsibility
		Design an SFI Workplace Culture Assessment based on staff input.	
		Obtain a workplace culture baseline using the SFI Workplace Culture Assessment.	
		Design feedback mechanisms to support staff and ensure they have a voice (such as project completion, asking for help, incident reporting, reporting what could be improved, and debriefs after programs) implement at least one per quarter.	
		Implement at least one team-building or culture-building activity per month in staff and BOD meetings.	
		Design an intentional staff evaluation tool, annually.	
		Design an intentional, organization evaluation tool.	
		Update individual staff evaluations to include components that address developing positive workplace culture.	
		Have staff evaluate themselves on the development of a positive workplace culture using the SFI Workplace Culture Assessment.	
		Identify areas of growth and create a plan to address them, annually.	
		Measure staff turnover and retention annually and track improvement.	
		Ensure that recruitment, language, and job requirements in our position descriptions are written through an equity lens.	
		Hire and post jobs so staff choices reflect our service community. Staff completes demographic survey at hire and annually.	
		Gather staff demographic information to move toward cultural relevance and reflective community representation from employees and staff wide. Track change annually.	
		Provide facilitation training for leadership to engage staff in sensitive cultural, socio-economic, and gender issue discussions.	

Focal Area	Goal	Tactics	Responsibility
		<p>Provide annual training for YEP staff to appropriately respond to students that have high poverty rates, adverse childhood experiences, and trauma. Consult with EDI professionals to evaluate our youth program through an EDI lens and operationalize learning for instructors.</p> <p>Provide employee housing similar to AmeriCorps housing option.</p> <p>Provide annual cultural agility training.</p>	
Financial I	Develop a financial plan and funding strategy to meet the current 3-year cycle of SFI needs, including a 3-year plan to dedicate the quarterly Kendeda endowment interest disbursements to facility and property maintenance, development, and restoration.	<p>Identify the full menu of potential programs, including developing programs and capacity.</p> <p>Project direct fixed and variable micro costs to run each program.</p> <p>Project micro revenue on each program based on capacity.</p> <p>Propose a timeline for implementation of programs based on expected cost and revenue.</p> <p>Apply indirect costs (administrative and overhead) to each program using a reasonable accounting principle, such as percent of projected revenue or percent of gross profit.</p> <p>Project annual expenses and income by program, to estimate financial sustainability and cost per participant.</p> <p>Project 3-year expenses and income by program, to estimate financial sustainability and cost per participant.</p> <p>Update projections based on incoming data and information, twice annually.</p> <p>Create a ranked list of programs based on financial sustainability with a break even point.</p>	

Focal Area	Goal	Tactics	Responsibility
		<p>Identify program development from the ranked list based on overall organizational financial sustainability.</p> <p>Review grant opportunities to identify those that support the SFI mission and values, and apply for at least 12 grants per year.</p> <p>Project special event revenue and impact.</p> <p>Project the donor revenue.</p> <p>Project membership revenue.</p>	
Financial II	Implement a donor stewardship and legacy giving program to establish fundraising goals and donor retention goals for the 2022 fiscal year.	<p>Determine schedule for a monthly, segmented email schedule via Bloomerang for the following: newsletter and donor solicitation, thank you, end of year tax receipt, and impact report. Represent on the fundraising calendar.</p> <p>Create monthly giving letter templates in Bloomerang for each monthly donor segment.</p> <p>Market legacy giving via storytelling/recognition through newsletter and donor communications quarterly.</p> <p>Define what types of legacy gifts we are willing to accept.</p> <p>Develop legacy gift protocols and policies (e.g. legacy gifts that go to our endowment balance).</p> <p>Post legacy gift program options on our website, with contact information and a plug on our donor page.</p> <p>Create a holistic, fundraising calendar for donor outreach, appeals, capital campaign, giving Tuesday, and events, annually.</p> <p>Overhaul the membership program to include tiered giving levels, program benefits, and member appreciation events.</p>	BOD

Focal Area	Goal	Tactics	Responsibility
		Eliminate economic barriers to participation by increasing AEP scholarships by 5% annually, and maintaining or increasing scholarships, free programming, and volunteer opportunities for the youth program. Track the number of students receiving scholarships and establish benchmarks for continued improvement.	
Board of Directors I	Develop committee charters and governance documents, including an anti-racism plan.		
		Develop and stay current with committee charters. Develop committee charters when new committees are formed.	Exec committee
		Identify missing, needed, or to-be-updated governance documents, policies, and procedures, including board roles, board responsibilities, and board terms.	Exec committee
		Write governance documents and policies, and update out of date policies. Process as identified, at a rate of one every 6 months.	Exec committee
		Develop an anti-racism plan as a committee after exploring funding for the planning process.	Exec committee
Board of Directors II	Develop a recruitment and selection process to ensure incoming board members bring needed attributes, and establish on-boarding procedures to ensure their success and retention.		
		Review recruitment plan and processes, and update to meet current needs.	Exec committee
		Implement recruitment activities quarterly to fill the pipeline of potential board members. Recruit two new board members per year until the board is full.	Exec committee
		Identify the aspects of a successful board selection process.	Exec committee
		Document the process and the materials needed for successful recruitment and selection.	Exec committee

Focal Area	Goal	Tactics	Responsibility
		Identify the aspects of a successful on-boarding process.	Exec committee
		Establish clear workflows for an engaging and valuable on-boarding experience.	Exec committee
		Gather BOD demographic information upon selection and annually, to move toward cultural relevance and reflect community representation.	Exec committee
		Provide annual cultural agility training for BOD.	Exec committee

Appendices

Appendix A

Glossary of Terms

ACEs - Adverse Childhood Experiences, describes a traumatic experience in a person's life occurring before the age of 18 that the person remembers as an adult.

AEP - Adult Education Program

BOD - Board of Directors, Siskiyou Field Institute

ED - Executive Director

ODS - Outdoor School

YEP - Youth Education Program

Deer Creek Center - The name refers to the property and lodge located at 1241 Illinois River Road, Selma, Oregon.

Ecoregion - An ecoregion or ecozone is an ecologically and geographically defined area that is smaller than a bioregion, which in turn is smaller than a biogeographic realm. Ecoregions cover relatively large areas of land or water that contain characteristic, geographically distinct assemblages of natural communities and species

Endemics -Endemic species are native to a single defined geographic location, such as an island, region, state, or other defined zone or habitat type. Organisms that are indigenous to a place are not endemic if they are also found elsewhere.

Herbarium -A herbarium is a collection of preserved plant specimens and associated data used for scientific study.

Serpentine ecology - Serpentine soil is an uncommon soil type produced by weathered, ultramafic rock, such as peridotite and its metamorphic derivatives such as serpentinite. Together, these factors create serious ecological challenges for plants living in serpentine soils. Due to the intense selective pressure generated by such stressful conditions, serpentine soils promote speciation and the evolution of serpentine endemism, contributing to unique biotas worldwide.

Serpentine barrens - Serpentine barrens represent the driest natural community that occurs in the serpentine environs of the Klamath-Siskiyou region.

Siskiyou Field Institute - The current name of the 501(c)(3) nonprofit organization.

Spring-fed fens - Fens are a type of wetland where the water table is at or near the ground surface for most of the growing season in most years. As a consequence, the soil is poorly aerated, and inundation or saturation last long enough that the dominant plants are those that can exist in wet conditions.

Wilderness - A wilderness is a region where the land is in a natural state and impacts from human activities are minimal.

Appendix B

Strategic Planning Committee and Participants

Strategic Planning Committee, led by the Executive Committee

Regina Castellon, Board President
Kathy Mechling, Immediate Past Board President
Lyndia Hammer, Treasurer
Vicki Snitzler, Vice President
Julie Norman, board member
Sarah Worthington, Executive Director

Board of Directors

Maelagh Baker
Bruce Donelson
Dan Mancuso
Nathan Williams

Retreat participants

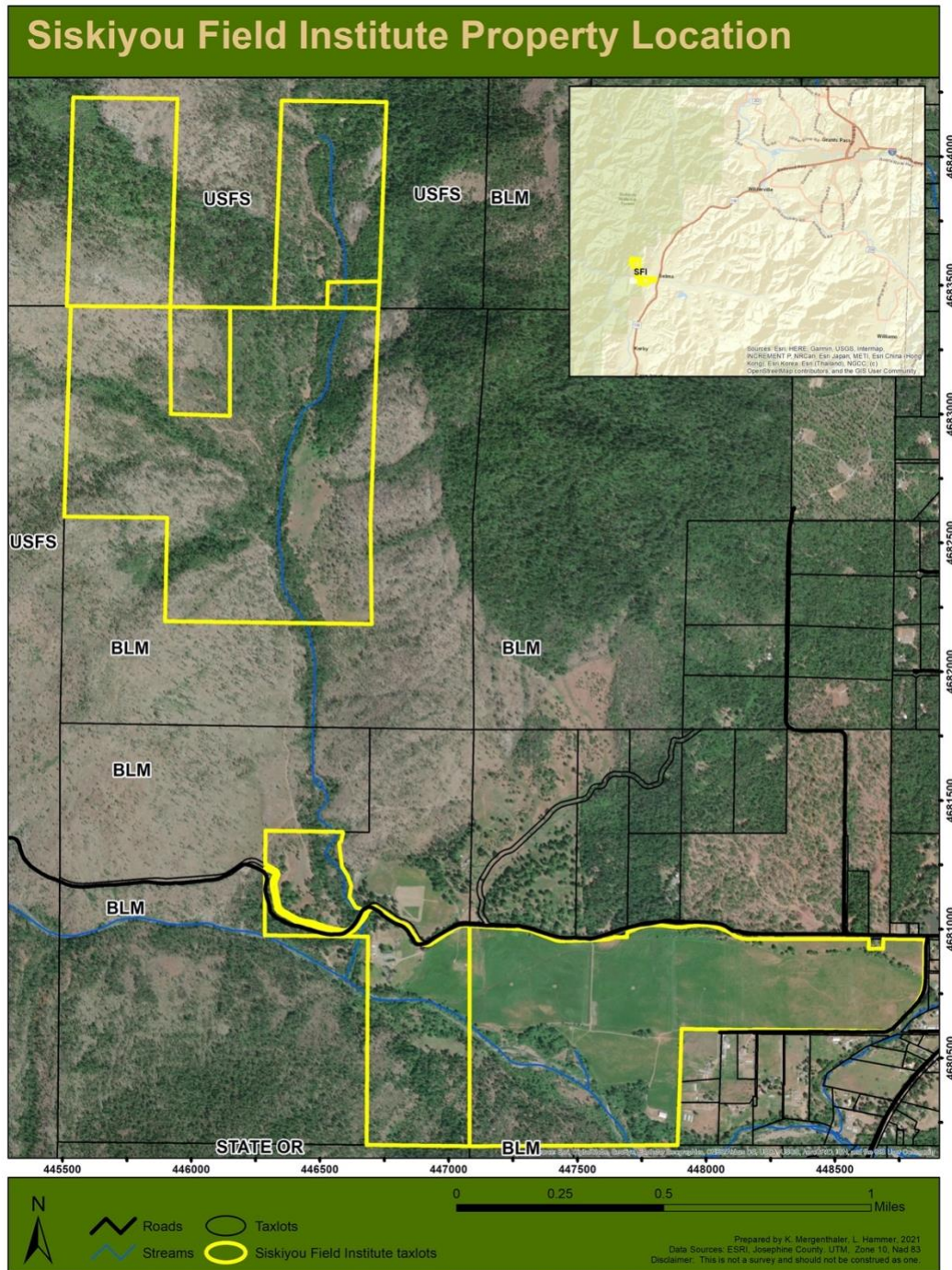
Mark Flynn, past board member
Lee Webb, past board member
Karen Chase, past board member

Staff

Kathy Pyle
Angie Fuhrmann
Brandi Patterson
Lillie Hazelton

Appendix C

Property Map



Appendix D

Property Description

SFI occupies ancestral lands of the Takelma, Shasta, and other First Nations of the Klamath-Siskiyou bioregion. We acknowledge the vast benefits we have gained by way of their and others' subjugation, suffering, displacement, and death. We are committed to caring for this property in honor of these people and this precious place on the planet.

The Deer Creek property features a main parcel of 460 acres. Approximately 17 acres of this tract have structures, including the Kendeda House, a secondary residence, and three outbuildings. Approximately 200 acres of the main parcel contain irrigated hay fields with occasional herds of cattle. The remaining parcel of 390 acres is undeveloped and being managed for conservation only.

The 6,000 square foot Kendeda House has four bedroom/bathroom suites, a downstairs living space with bathroom, a large hostel-style kitchen, open living/dining space, additional bathroom and laundry facilities, and a 30'x45' classroom. Outbuildings include a solar powered bathhouse, a general solar power array, outdoor pavilion, two yurts, and a ropes challenge course.

Guests and course participants are allowed to camp on the property. A caretaker is on-site full time.

Appendix E

Sample of Research Projects

- University of Oregon research on the impacts of climate change on native plants
- Seismic monitoring project by the University of Oregon as part of the Pacific Northwest Seismic Network <https://pnsn.org/seismogram/current/sisq>
- Oregon State University climate research, 2012-2019
- Research by many graduate students over the years, from the lab of Susan P. Harrison, PhD (Environmental Science and Policy researcher at UC Davis), from the lab of Tom Spies, PhD (USFS researcher based at Oregon State University), and from Linfield College in Portland.
- Citizen science projects, including botanical surveys and aquatic monitoring in our Lyford research pond.
- Western pond turtle (*Emys marmorata*) surveys, ongoing
- Pacific lamprey surveys by Stewart Reid, PhD westernfishes@opendoor.com.

Appendix F

Referenced Article Links

BEETLES

<http://beetlesproject.org>

Oregon History Project / Historic Flood and Fire:

<https://www.oregonhistoryproject.org/articles/flood-and-fire/#.X7mJy8ZKhQZ>

Oregon History Project /Native American Cultures:

<https://www.oregonhistoryproject.org/articles/native-american-cultures/#.X7mJlMZKhQZ>

Western Rivers Conservancy purchase of Deer Creek Ranch:

<https://www.westernrivers.org/projects/ca/deer-creek#:~:text=Deer%20Creek%20is%20the%20largest,Creek%20Center%20for%20permanent%20Conservation>

Appendix G

Example of a Decision-making matrix

(e.g., an Opportunity Matrix that includes the funding mechanism, programmatic attributes, and values)

This Matrix example is descriptive, not the content for the actual use.

Rate the alternatives 1-5 (1=least, 5=most) indicating the degree to which each alternative supports each criterion.

	Well	Pipeline in current position	Pipeline taking a new route	Pump from creek
Supports the Mission				
Supports our competitive advantage				
Restorative				
Financially feasible				
Supports our Values and Vision, and EDI				
Adtl. factors...				

Decision-making matrix presented in Real-time Strategic Planning, by David LaPiana.

Appendix H

Annual Work Plan for Achieving the Strategic Goals

The SFI executive director maintains an annual work plan for tracking and achieving the strategic plan goals. Contact the executive director for more information on the current work plan.

Appendix I

Goals for Consideration in Future Strategy Selection

Proposed goals that did not become a part of this plan are being held for future evaluation, development, and implementation when SFI has the capacity to address them.

Program

Expand the YEP program to year-round for an 80% full schedule of current programs offered. *(In progress)*

Develop the Adult Education Program plan to a break-even financial point. Implement the Adult Program plan. *(Focus groups suggested for needs analysis.)*

Add an innovative component to AEPs. Develop the Adult Residency program plan. (AKA: Research in Residence program.) Stay in dorms, have a product at the end. Potential income and notoriety. Possible science communication emphasis, match artists and researchers. Evaluate distance classes and partnerships. *(Be flexible and creative. Novel. Determine what would be of immediate interest.)*

Provide inclusivity and equity for special needs and culturally diverse students by obtaining staff training, securing necessary/appropriate equipment and providing scholarships. *(Infrastructure is required to get our campus up to ADA or serve needs of special needs kids.)*

Increase ranking in the OSU extension outdoor education evaluation (comparing outdoor school providers). *(2020, 4-day YEP ranked among the top in state.)*

Market and build the environmental education high school student mentorship/internship program. To 2 interns per year, one each Youth and Adult programs and at least 3 high school student leaders. *(Active in 2019. Job descriptions and application going on the website. Next step is to get the word out. Starting a HS mentorship program for ODS.)*

Increase scholarship recipients. Support % of participants with scholarships. OR Provide a set dollar amount in scholarship funds annually.

Use the ropes class year-round for adults and youth.

Develop a YEP business plan. *(Consider a business student intern.)*

Campus

Hire a manager/ecologist to manage the land and the conservation easement.

Build or re-purpose facilities to attract and support researchers.

Install solar and ensure solar + storage = net 0

Meet industry standards with science equipment and classroom facilities.

Develop an effective campus management plan for facilities/buildings.

Staff

Hire a property manager, land manager, ranch manager, conservation manager, facilities manager or ecologist to fulfill identified needs on the property and manage the conservation easement.

Positions are staffed at a level the budget can sustain.

Evaluate facility and program staffing needs, and set staffing levels to meet them.

Identify a succession plan for key positions.

Hire a development director to meet the scope of the strategic plan goals.

Create career advancement opportunities for staff to pursue.

Equip staff with the needed resources and time to perform their duties.

Collaborate with other Outdoor Education providers to provide a pooled benefits package.

Financial

Fund the full-time executive director and all other required FTE staff positions through grants, or ideally, program fees.

Utilize our new database and Sarah's training for fundraising and cultivating donors/foundation support.

Complete and keep current appropriate financial responsibilities and legal requirements for organizational stability, including tax-exempt status and insurance.

Each board member takes an active role and responsibility participating in effective fundraising and revenue-generating activities.

Generate revenue using facility resources in line with values and vision.

A development director is utilized to secure funding, specifically for priority structures.

Double fundraising income in 3 years.

Establish grant writing and fundraising goals.

Develop a grant opportunities spreadsheet with criteria for prioritizing, use this to measure progress including evaluating successes and non-awards.

Develop a fun, unique year-round lodging for program needs and financial sustainability.

BOD

Each board member commits to and follows through annually on fundraising and event responsibilities.

Define the community SFI wishes to serve and identify what is relevant in that community.

