



**PILOT PEAK**  
CONSULTING

**STRATEGIC PLAN PREPARED  
WITH:**



PRESENTED ON MAY 25, 2023

**PREPARED BY: PILOT PEAK CONSULTING, LLC**

Emma Gilmore Kieran, Principal

T: (703) 772-7472 E: [emmakieran@pilotpeakconsulting.com](mailto:emmakieran@pilotpeakconsulting.com)

# Contents

Executive Summary	3
About the Plan	4
<i>How to Read this Document</i>	4
<i>About the Facilitator</i>	4
<i>The Planning Process</i>	4
Mission, Vision, and Values	7
Current State	7
Additional Observations	11
ARCS Foundation's Desired Future	15
The Seven Pillars of the Strategic Plan	15
Final Recommendations	18
Conclusion	19



## FY2024 – FY2025 Strategic Plan

---

### A. Executive Summary

Since 1958, ARCS (Achievement Rewards for College Scientists) Foundation has advanced science and technology in the United States by providing financial awards to academically outstanding students who are US citizens studying to complete degrees in science, engineering, math, technology, and medical research.

ARCS Foundation believes that support of STEM education is essential to US economic growth, technological competitiveness, and continued global leadership. To address the country's need for new scientists and engineers, ARCS Foundation funds prestigious ARCS Scholar Awards to help the country's brightest graduate and undergraduate students create new knowledge and innovative technologies.

ARCS Foundation works in close collaboration with 15 regional Chapters that partner with leading universities and builds industry partnerships to enhance advanced goals for America. The organization has provided more than \$131 million to more than 11,500 students selected by their universities for their outstanding potential to make a difference.

The following plan is the strategic roadmap for ARCS Foundation to deliver on its mission over the next two years. This plan has been built with the voices and perspective of the Board of Directors, Council of Presidents, Council of Advisors, and other key stakeholders. This roadmap focuses on seven pillars:

1. **Philanthropy:** Develop financial sustainability to ensure the organization continues to thrive and succeed into the future
2. **Governance:** Structure the Board to effectively and efficiently accomplish the organization's goals
3. **Infrastructure:** Develop a robust and integrated infrastructure to meet its organizational scalability and growth goals
4. **Marketing and communications:** Expand awareness of the organization's mission, impact, and opportunities externally
5. **Membership:** Support the acquisition and retention of a diverse and robust membership
6. **Programs and services:** Provide excellent programs and services to meet the needs of the Chapters, members, and scholars
7. **Staff and volunteers:** Define and implement an efficient sustainable staff and volunteer model

Investing in these seven areas will help ARCS Foundation move positively in the direction of a fully developed and financially sustainable organization.

## B. About the Plan

### *How to Read this Document*

Any plan for where you want to go in the future needs to be grounded in a shared understanding of where you have been in your past and where you are right now. This plan was built based on that philosophy, starting with an assessment of ARCS Foundation's current state and landscape. Accordingly, this document starts with an overview of that current position.

Strategy is the means to achieving the mission and vision of any organization. This plan supports the current mission, recently enhanced vision statement, and newly created organizational values statements, which are presented next. All of the strategic priorities and action plans that follow should be read through the lens of achieving that vision.

The plan has defined seven strategic pillars for fiscal years 2024–2025, which are presented in this plan alongside their strategic goals. Within each strategic goal are detailed action plans of tasks for how to achieve these objectives over the life of the plan. The ARCS National Board should regularly review and discuss these strategic goals and tasks. These action plans are ever-evolving and intended to be revisited regularly by the ARCS National Board to evaluate performance and adjust tactics as needed to ensure the strategic pillars are achieved.

### *About the Facilitator*

Founded by Emma Kieran, Pilot Peak Consulting (PPC) has over 20 years of experience supporting the missions, leaders, and teams of nonprofit organizations. Emma specializes in assessing organizational capacity for growth and building detailed strategic plans for the infrastructure and strategies needed to move organizations forward. ARCS Foundation engaged PPC from October 2022 to June 2023.

### *The Planning Process*

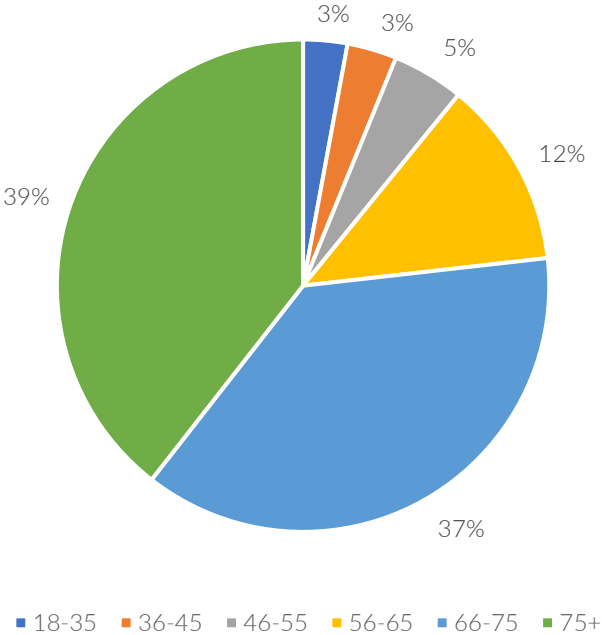
During the engagement, PPC conducted external data collection via three focus groups, one interview, and one online membership survey to assess stakeholder perceptions of ARCS Foundation. After presenting the current state and data collection analysis, PPC conducted a one-day retreat to address ARCS Foundation's vision and define its value proposition, programmatic offerings, operational needs, policy changes, and desired impact in service of that vision. PPC's work culminated in the production of a written strategic plan with detailed instructions for achieving the plan's goals, an action plan showing the goals and tasks, and a dashboard for ongoing measurement of metrics.

The external data collection participants included:

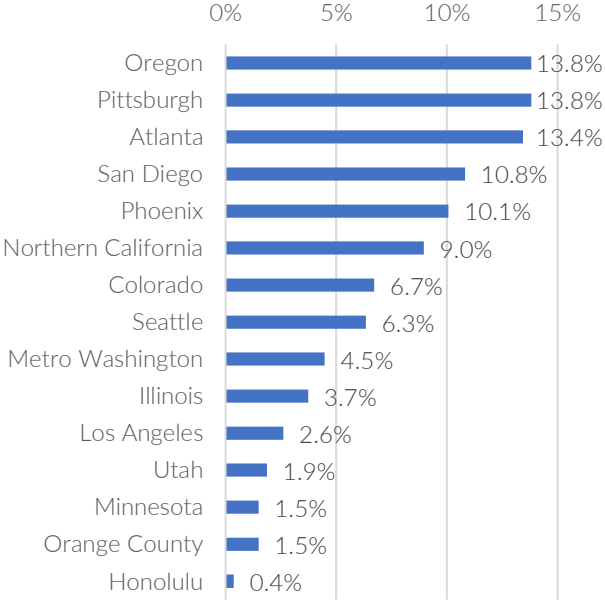
- *Council of Presidents (COP) Focus Group*
  - Kathe Albrecht, San Diego
  - Stephanie Beckman, Orange County
  - Elizabeth Bell, Oregon
  - Julie Branford, Oregon
  - Sara Jean Burke, Atlanta
  - Ana Chu, Orange County Chapter
  - Anne Crawford, Pittsburgh
  - Holly Heaton, San Diego
  - Susan Howard, Colorado
  - Katy Hope, Northern CA
  - Chandra Jain, Orange County
  - Judy LeMarr, Phoenix
  - Sandra Mangurian, Illinois
  - Margaret McGann, Seattle
  
- *Executive Committee (EC), National Board Committee Chairs, and Council of Advisors (COA) Focus Group*
  - Executive Committee
    - Nancy Chambers, Atlanta
    - Cheryl Mae Craft, Los Angeles/Orange County
    - Christine Hawes, Phoenix
    - Anna Maria Matteucci, Phoenix
    - Patty Sparrell, Metro Washington
    - Linda Thier, Pittsburgh
    - Sarah Vandenplas, Illinois
    - Beth Wainwright, Pittsburgh
  - NB Chairs
    - Aletha Anderson, Oregon
    - Lynne Brickner, Los Angeles/Utah
    - Jill Bray, Co-Chair, Phoenix
    - Sara Jean Burke, Atlanta
    - Joan Foley, Oregon
    - Chris Simpson Brent, Northern California
    - Yolanda Walther-Meade, Los Angeles/San Diego
  - Council of Advisors
    - Linda Celesia, Illinois
    - Jean Josephson, Oregon
    - Sherry Lundeen, Atlanta
    - Susan McGonigle, Atlanta
    - Kathy Testoni, Pittsburgh
    - Janie Wilson, Atlanta
  - Other attendees
    - Jane Dolinger, Atlanta
    - Holly Heaton, San Diego
  
- *Long Range Planning (LRP) Committee Focus Group*
  - Diana Alexander, Phoenix
  - Judy Benham, Minnesota
  - Linda Burks, Pittsburgh
  - June Chocheles, San Diego
  - Cheryl Ernst, Hawaii
  - Barb Goergen, Minnesota
  - Sue Harter, Pittsburgh
  - Anne Jarvis, Oregon
  - Sally McDaniel, Atlanta
  - Susan Smith, Oregon
  - Nancy Spetzler, Phoenix
  - Andrea Thoreson, Seattle

- *Interview with Association Services Group, LLC*
  - Katie Oxford, Chief Executive Officer
  - Samantha Kilgore, Chief Marketing Officer
  
- *Survey*
  - Invited approximately 1,107 participants
  - Received 277 total responses; total response rate of 25%, with a 99% completion rate
    - Demographics of survey respondents
      - 94% identified as white
      - 85% are active members
      - 52% of survey respondents have been members for 11+ year

Age Range of Survey Respondents



Chapter Representation in Survey Responses



Every step of the planning process was intentionally broad and inclusive to ensure the plan responds to the needs, and opportunities, in front of every part of ARCS Foundation. The following strategic priorities and action plans are the result of this collaborative effort.

## C. Mission, Vision, and Values

Throughout the strategic planning process, ARCS Foundation enhanced its vision and created organizational values statements to help guide and focus the strategy setting. At this time, the mission will remain as it stands. Once the Lawful Permanent Resident Task Force has completed its work, the Long Range Planning Committee will determine how and if to revise the mission (likely fall 2023).

This planning process resulted in the following statements. They are as follows:

- **Vision** – The US is the global leader in scientific and technological innovation.
- **Values**
  - Inclusivity – respecting all people and creating a welcoming environment
  - Collaboration – working together towards shared goals
  - Passion – dedication to our mission and supporting ARCS Scholars in their work
  - Adaptability – adjusting to new conditions and circumstances
  - Integrity – being honest and having strong moral principles
  - Volunteerism – honoring ARCS Foundation’s active volunteers who help achieve Chapter goals
  - Stewardship – stewarding philanthropic commitments and valuing those who contribute to furthering ARCS Foundation’s mission

## D. Current State

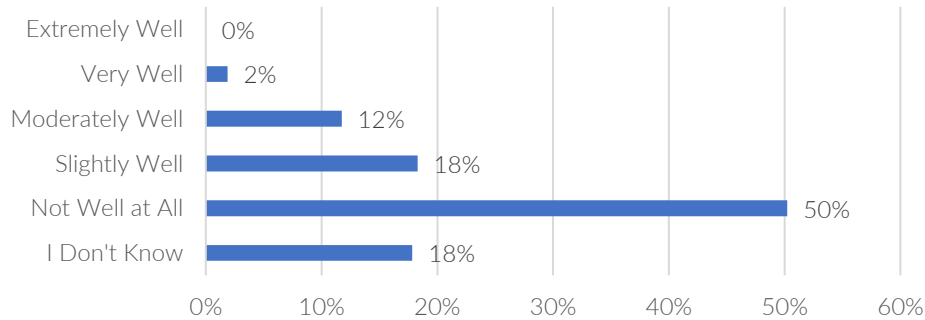
- *Mission and Involvement*
  - When PPC asked stakeholders why ARCS Foundation’s work is important on a national scale, three key themes emerged:
    - The U.S. is in desperate need of *“STEM skills and leaders”* because its position in the global sector is slipping and there is no compelling *“case for students to study science.”* ARCS Foundation is *“putting STEM on the front page”* and addressing this issue through *“supporting STEM education”* via its network of universities where scholars are *“leading us into the future.”*
    - All *“scholars are supported with unrestricted dollars,”* which eases their research because the grants *“come with no strings.”* Scholars can use the full grant amount as they see fit, which enables them to *“make a difference in solving medical, environmental, and other scientific problems.”*
    - Internally, ARCS Foundation *“sets and maintains standards for how we do business and helps Chapters to meet and maintain those standards.”* It also *“provides resources and support to individual Chapters,”* so they work consistently and cohesively with each other.
  - Survey respondents were also asked to share why ARCS Foundation’s work is important locally:

- Chapters' local academic partners *"use ARCS awards to recruit the best possible candidates for their programs."*
  - The areas where Chapters operate have *"unfulfilled job openings"* for careers in STEM. Scholars serve as a pipeline for the local STEM workforce and stimulate the local economy.
  - ARCS Foundation welcomes students to the local community through its support, which allows them to *"focus on their academic work and launch careers"* in STEM.
- *Strengths*
    - ARCS Foundation stakeholders mentioned a plethora of organizational strengths. Key themes from PPC's discovery are noted below.
      - It is clear that ARCS Foundation's ultimate strength is its mission and the scholars. Stakeholders believe ARCS Foundation has a *"spectacular mission that is relevant"* and that the scholar grads are the mission's main product. They recognize and appreciate *"the legacy of ARCS"* and the organization's *"substantial track record"* which is unique in that it has never strayed away from its mission since its founding in 1958.
      - Another key strength of ARCS Foundation, mentioned by numerous stakeholders, is *"the commitment of the Board and members"* not only to the mission of ARCS Foundation, but to each other as volunteers. Volunteers noted that *"we support each other very well"* and *"we have fun when we get together."* Stakeholders specifically noted that ARCS Foundation has *"retained volunteers well"* over the years with many *"strong members"* being involved for over a decade.
      - Throughout PPC's focus groups, participants often identified collaboration as a strength of ARCS Foundation. They believe the *"initiation of the collaborations network has been one of the best things that's happened."* The Board is lauded for working very hard on this collaboration and it has resulted in *"much more cohesion and community."* This collaboration has *"strengthened [ARCS] as a national organization [to] solve local and National issues better."* Further, ARCS Foundation's adaptability to Zoom during the pandemic shifted the organization's culture to meet regularly to continue progressing work throughout the year.
      - ARCS Foundation's focus on women was often cited as a strength. Stakeholders view ARCS Foundation as *"an opportunity for women to gather with a common interest – as a community to learn and share ideas."*
  - *Areas for Improvement and Challenges*
    - Educating members on the existence, purpose, and benefits of the National organization
      - *"When people join, they don't think about ARCS as a national organization."*
      - *"It's very difficult to determine what efficiencies I can get from National."*
      - *"[It's a] longstanding problem. Chapters don't know what National is."*
    - Addressing volunteers' limited capacity to fulfill their roles and responsibilities and the need for paid staff to manage the heavy workload



- *“National needs to accommodate working mothers – the timing and commitment for National committees is too much.”*
- *“We are all at our max at this point.”*
- *“Everyone is so busy and strained given it’s a volunteer run organization.”*
- Engaging alumni more deeply and frequently
  - *“[We] need to engage the spectrum of alumni.”*
  - *“[ARCS can] do a better job staying in touch with scholars and nationalizing that.”*
  - *“[We] need to standardize the [alumni] information we have... we lack contact information for many alumni.”*
- Strengthening ARCS Foundation’s relationships and collaboration with universities
  - *“We want universities to call us, but there’s nowhere for them to call.”*
  - *“University partners are our competition for funding.”*
  - *“We have to build a strong understanding with new universities up front.”*
- Creating a comprehensive fundraising strategy and reliable stream of philanthropic revenue
  - *“Nationally, we aren’t on a financially sustainable path.”*
  - *“We go back to the same [donors] year after year.”*
  - *“It’s a conflict [of interest] for National to fundraise while Chapters fundraise.”*
  - *“[I] would like to see more collective fundraising.”*
- Expanding the number of Chapters and members
  - *“We have been in several different places and failed.”*
  - *“We just hope to not lose any [Chapters].”*
  - *“If National doesn’t provide the support, then we could be in danger of losing [members].”*
  - *“We need a different model to attract members.”*
- Increasing ARCS Foundation’s brand visibility and raising awareness to the organization’s work
  - While a *“subset of universities”* that ARCS Foundation interacts with knows the organization well, *“the general public does not.”*
  - *“[ARCS is] sometimes confused with other organizations.”*
  - *“People don’t really understand the mission.”*
  - 50% of survey respondents report that ARCS Foundation is not well-known at all on a national scale.

## How well-known is ARCS nationally?



- *Opportunities*

- There was a myriad of suggestions for opportunities of which ARCS Foundation should take advantage. Common suggestions included:
  - Employing full time, paid staff
  - Employing a more concerted effort to fundraise and develop donor relationships at the National level, so funding can trickle down effectively to individual Chapters
  - Fostering stronger relationships and deeper connections to alumni and scholars
  - Embarking on a national marketing campaign to raise awareness to the ARCS Foundation brand and its mission
  - Developing stronger university partnerships that enable universities to leverage ARCS Foundation support
  - Creating more opportunities for Chapter members and scholars to interact and engage with each other
  - Systematically supporting each Chapter with an organized suite of templates, trainings, and support tools, so Chapters can operationalize its volunteer management, alumni engagement, fundraising, and day-to-day operations effectively
  - Focusing on transition management to ensure leadership changes throughout the organization are smooth and efficient
  - Reviewing the annual meeting to ensure its supporting ARCS Foundation's goals are used more effectively

- *Growth Priorities*

- Identifying and executing a new organizational model will grow and sustain ARCS Foundation into the future. *“National has little control over the independently run Chapters”* with the current organizational model, requiring volunteers to manage the bulk of the day-to-day operations with some staffing support.
- Stakeholders encouraged ARCS Foundation to *“expand and grow”* the number of Chapters across the country. They acknowledged that a new Chapter hasn't been

established in many years. In order to increase the number of Chapters, stakeholders recommended an assessment of the closed Chapters to determine why they failed.

- Developing a different model to attract members and increase member recruitment is important to stakeholders. Some Chapters are currently challenged with new member recruitment and need guidance, tools, and resources from National to help them grow their member base.
- A shared desire for a more sustainable funding model exists to ensure National is on a path toward long term financial health. Professionalizing and prioritizing fundraising at the National level will allow ARCS Foundation to more effectively support Chapters that are currently struggling to fundraise. ARCS Foundation will also need consistent fundraising messaging, storytelling, and talking points to ensure all fundraising communications are in sync.

These findings were reviewed with the Long Range Planning Committee during the planning process.

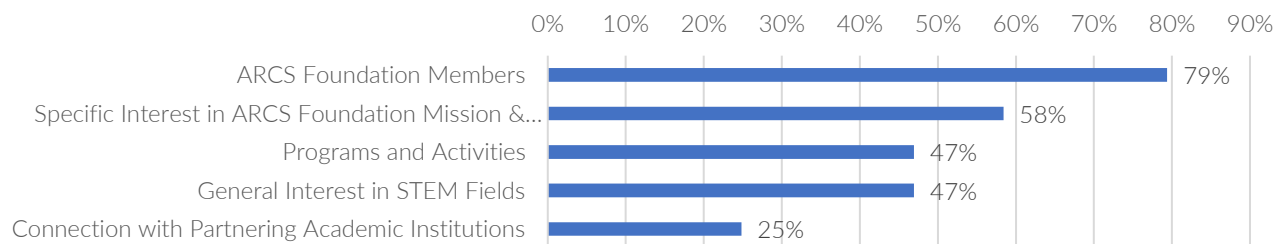
## E. Additional Observations

In addition to compiling stakeholder feedback, PPC reviewed internal documents from ARCS Foundation to supplement its understanding of the organization's strengths and challenges. Below are additional observations made by PPC based on stakeholder feedback and internal document review:

- *Governance*
  - ARCS Foundation's governance is very professional, and procedures are followed. Without an Executive Director, however, the ARCS Foundation Board can't focus strategically. Instead, the Board prioritizes lower stakes decision-making at a tactical level. The current governance structure keeps the Board in the weeds. With Committee rotations every two years, there's not enough continuity.
  - The Board's Philanthropy Committee Charter is fairly thorough but could be more detailed about the roles and responsibilities of Committee Members. Also, the Board orientation slides lack detail about the Board's specific fundraising roles and responsibilities.
- *Programs*
  - Focus group participants and survey respondents were asked what programming they would like to see ARCS Foundation provide over the next few years to support its mission. While many specific program requests were made, PPC identified a few common responses:
    - Several respondents commented that new programs were not needed. Instead, ARCS Foundation should continue its current programs or make the current programs more effective to better support Chapters.
    - Survey respondents seek more DEI training and support for their Chapters.

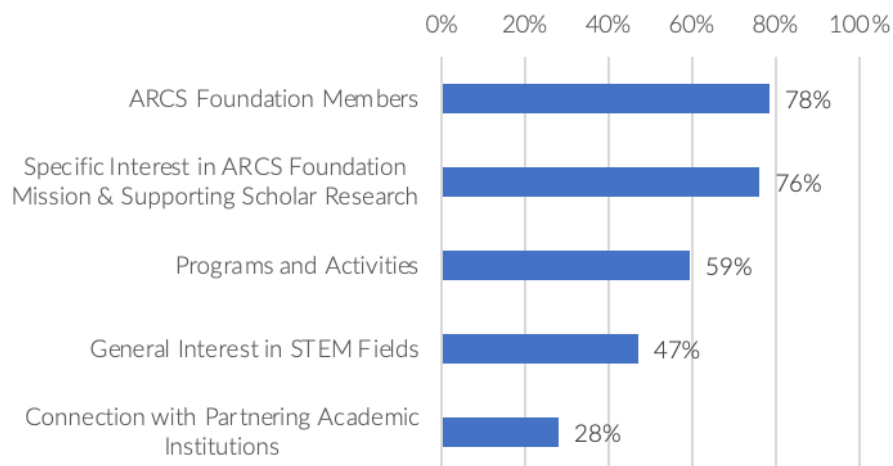
- Chapters would like templates, guides, and how-to resources to ensure they are continuing ARCS Foundation best practices and procedures.
  - Stakeholders desire more in-person and virtual events as well as more high-quality speakers at events.
- *Membership*
    - When survey respondents were asked to describe what attracted them to get involved as members, most noted they had friends or colleagues who were members already or they had a specific interest in the mission and supporting scholar research.

### What ATTRACTED you to ARCS Foundation membership?



- Survey respondents reported similar answers when asked to describe what keeps them involved or engaged as a member. A number of survey respondents also noted that they stay involved because of ARCS Foundation’s DEI initiative.

### What KEEPS you engaged as a member?



- Survey respondents were given a list of resources offered to Chapters by National. Almost half, 45%, of survey respondents reported not knowing that National provided these services. When asked what other resources ARCS Foundation could provide, survey respondents often answered with: fundraising and marketing materials, DEI support, and recruitment assistance.

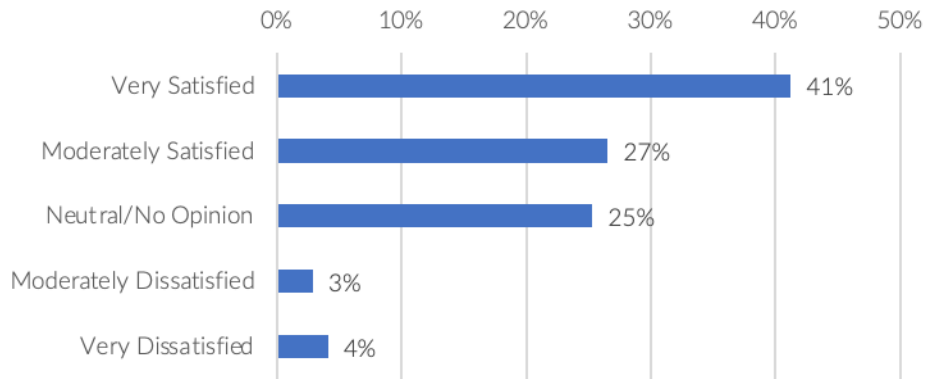
- *Fundraising and Communications*

- According to data provided by ARCS Foundation:
  - The total organizational budget dropped by 20% or about \$78K from FY21 to FY22
  - Total charitable giving dropped by 44% or about \$96K from FY21 to FY22
  - The percentage of charitable giving from foundations has dropped dramatically between FY20 to FY22 from 35% to 8%. Nearly all charitable giving comes from individuals. There is no corporate revenue.
  - The median gift level is \$100, which has remained steady since FY20.
  - The number of donors decreased from 266 to 177 from FY21 to FY22.
  - ARCS Foundation’s historical renewal rate is above industry average (about 43%) but dipped below average in FY22 to 39% from 58% in the year prior.
  - The number of gifts received within each giving range has decreased from FY21 to FY22. ARCS Foundation hasn’t received a \$100K+ gift in the past three years with the exception of a seven-figure gift in fall of 2022.

OVERALL REVENUE	FY22	FY21	FY20
Total Organizational Budget	\$303,985	\$381,640	\$370,118
Total Charitable Giving	\$120,973	\$217,447	\$172,599
Budget vs. Giving %	40%	57%	47%
% of giving from Individuals	91.73%	72.17%	68.89%
% of giving from Foundations	8.27%	27.83%	35.34%
% of giving from Corporations	0.00%	0.00%	0.29%
Low Gift	\$1	\$5	\$25
High Gift	\$15,000	\$50,000	\$50,000
Median Gift	\$100	\$100	\$100
Total Number of Donors	177	266	177
Renewal Rate	39%	58%	45%
Gifts @ \$100k+	0	0	0
Gifts @ \$50k-99k	0	1	1
Gifts @ \$10k-49k	2	4	2
Gifts @ \$5k-9,999	6	8	5
Gifts @ \$2,500-4,999	4	8	7
Gifts @ \$1k - 2,499	20	21	18
Gifts @ \$500 - 999	17	22	25
Gifts @ \$100 - 499	72	125	61
Gifts @ <\$100	53	77	101

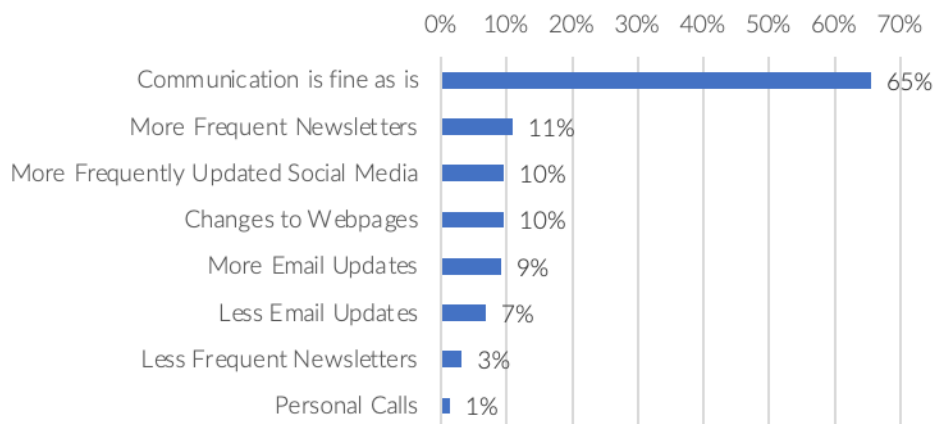
- 68% of survey respondents are moderately or very satisfied with communications from National over the past two years. Just 7% are moderately or very dissatisfied.

### How satisfied are you with the level of communication from National over the past two years?



- When asked how communications from National could be improved, 65% reported that communications are fine as is. About 10% of survey respondents recommended each of the following ways to improve communications: more frequent newsletters, more frequently updated social media, more frequent emails, and updates to webpages. A few stakeholders specifically noted that the “member website usability isn't great” and “materials are outdated.”

### How could National's communications be improved?



- *Staffing and Infrastructure*

- With volunteer capacity maxed out, stakeholders raised that the hiring of full-time professional staff, such as an Executive Director, is an idea that ARCS Foundation has wrestled with for some years. According to one stakeholder, *“it's time for us to think about having an Executive Director – someone who is consistently there to take us through our long-range planning.”*

- In terms of infrastructure, multiple stakeholders noted the *“need to have a better system for collecting and sharing data,”* especially as it relates to alumni information. Setting in place *“a good database and backend tech system”* will allow ARCS Foundation to achieve workflow efficiencies and better manage fundraising and engage alumni over time.

These additional observations were reviewed with the Long Range Planning Committee during the planning process.

## F. ARCS Foundation’s Desired Future

We will have a team that feels valued, engaged, and supported.

We will increase our mission’s impact and serve more members and scholars.

We will know and share our impact and outcomes and continue to support the next generation of scientists and engineers.

We will be appreciated as experts in our field, and our community will deepen their support for the important work that we do.

If we are to be serious about our future, we must have the core structure in place to propel us towards our goal to be a top of class organization.

## G. The Seven Pillars of the Strategic Plan

After reviewing the external data collection results, ARCS Foundation convened to create strategic multi-year goals and tasks for the organization for the next two years. The following strategic goals and tasks define ARCS Foundation’s overall direction for fiscal years 2024–2025. They will also help to drive resource allocation and provide focus to the day-to-day work at ARCS Foundation. These strategic priorities will be employed to advance ARCS Foundation from its current to its desired state.

A separate action plan in Excel format will guide ARCS Foundation to consistently prioritize implementing the actions and achieving the goals outlined below for each of the seven pillars.

- Philanthropy: Develop financial sustainability to ensure the organization continues to thrive and succeed into the future
  - Assess current fundraising activities
  - Determine 3-year goals for funding operations and other funding needs
  - Create a wide range of underwriting and sponsorship opportunities
  - Identify corporate and foundation grants that can be multi-year commitments
  - Assess National’s state of readiness for a campaign
  - Determine the need for paid staff/fundraising consultants

- Create a budget and recruitment plan for acquiring the needed staff/fundraising consultants
- Governance: Structure and operate the Board to effectively and efficiently accomplish the organization's goals
  - Determine the need for additional Board membership, sub-committees, and/or task forces around membership, Chapter support, scholar and alumni relations, and add Board positions as necessary
  - Revisit the mission after the task force on lawful permanent residents concludes its work
  - Structure full Board and Committee meetings to include time for generative discussions
  - Develop a plan to prepare for leadership succession and smoothly execute leadership transitions
  - Develop a recruitment plan to ensure identification of Board members with diverse skills and identities
  - Implement the Enterprise Risk Management Plan
- Infrastructure: Develop a robust and integrated infrastructure to meet its organizational scalability and growth goals
  - Document current Infrastructure (e.g.: Information and Accounting systems, Policies & Procedures, etc.)
  - Generate functional requirements that will support scalability and growth goals
  - Identify, analyze, and evaluate infrastructure architectures and best practices employed by “like” organizations
  - Develop a proposed infrastructure architecture
  - Develop an executable plan to fund, build, and deploy the approved infrastructure architecture
  - Implement the infrastructure plan
- Marketing and Communications: Expand awareness of the organization’s mission, impact, and opportunities
  - Evaluate the current communications methods' successes and areas of opportunity, and then assess their impact on ARCS Foundation
  - Utilize current surveys to understand current communications needs of Chapters, members, scholars, and alumni
  - Develop a communications plan for internal and external audiences
  - Determine staffing and/or volunteer needs based on plan
  - Create communications opportunities to engage and promote scholars and alumni to showcase impact
  - Determine how to best leverage scholar testimonials, stories, and achievements to demonstrate impact in all communications
  - Benchmark with other membership-based national organizations to understand communications best practices between National and Chapters



- Develop public relations plan for involving individuals and organizations outside ARCS Foundation to promote its value
- Membership: Support Chapters in the acquisition and retention of a diverse and robust membership
  - Develop plan to help underperforming Chapters with financial and advisory support
  - Identify and share "best practices" for membership recruitment
  - Identify another "Sputnik" to stimulate membership
  - Determine opportunities to strengthen relationship between National and new members
  - Investigate a new "National" category for membership
  - Develop thorough, robust evaluation criteria and actionable steps for the creation of new Chapters
  - Develop process for visiting and supporting Chapters and using COA as mentors
- Programs and Services – Provide excellent programs and services to meet the needs of the Chapters, members, and scholars
  - Determine and prioritize Chapter, member, and scholar needs
  - Develop a compelling agenda for the AMC that attracts maximum participation from general membership
  - Expand participation in the collaboration network and continue to develop strong leadership
  - Enhance ARCS FORWARD to expand participation
  - Expand networking and programming opportunities for ARCS Scholars and Scholar Alumni
- Staff and Volunteers: Define and implement an efficient and sustainable staff and volunteer model
  - Create a Staff and Volunteer Task Force
  - Define baseline National roles and responsibilities for paid staff and for volunteers
  - Identify staffing gaps with attention to streamlining and reducing redundancy and low value work
  - Research models to address paid staff and volunteer needs
  - Identify the impact of National staffing changes on Chapters and determine plans for mitigation, where needed
  - Develop training and onboarding procedures for new paid staff or volunteers
  - Create job descriptions for new paid staff or volunteer positions
  - Determine next steps for relationship with ASG

## H. Final Recommendations

This strategic plan should serve as a guide to help ARCS through decision making around both strategic and tactical questions over the next two- to three-years. The plan should not, however, be so rigid as to prevent ARCS from seizing valuable opportunities as they arise. In addition to the goals and tasks listed previously, PPC offers the following recommendations:

- **Philanthropy:** Revenue generation needs to be proactive and diversified. While institutional donors (foundations and corporations) often seem like a more appealing funding source because they have guidelines and application deadlines, developing strong individual relationships can sustain the organization for decades. Individuals contribute nearly 80% of charitable dollars in the United States and the most successful nonprofits utilize their Boards to develop and maintain relationships with individual donors. PPC recommends enhancing individual donor relationships significantly and focusing on Board and Committee involvement.
- **Governance:** In addition to the tasks listed in the action plan, there was significant discussion around recruitment and the desire to identify the next generation of ARCS leaders. As committees begin to work towards achieving the recommended goals, PPC recommends the Board revisit how best to recruit, train, and retain a diverse group of professionals that can best support the mission of the organization.
- **Infrastructure:** Infrastructure is directly related to available resources – a more robust infrastructure will require significant financial investment. While this investment is critical to ARCS’s growth, PPC recommends first understanding what can be done with current resources to build efficiency before spending significant money on additional infrastructure.
- **Marketing and Communications:** Current communications is strong but limited by volunteer bandwidth. In order to enhance internal and external communications at ARCS, additional resources are needed. PPC recommends identifying these additional resources while maintaining current communication methods to focus more immediately on more pressing issues.
- **Membership:** Many Chapters mentioned the need for diversification of their membership. Without that diversification, there could soon be a critical shortage of members. This is one area where ARCS can be a resource and provide tips and best practices that are available to all.
- **Programs and Services:** ARCS provides high-quality and valued services to the Chapters but has not yet found a way to show that value to members and scholars. PPC recommends that ARCS focus on identifying opportunities for measuring impact to show members and scholars the value of the National organization.

- **Staff and Volunteers:** ARCS current structure is not sustainable. Without full-time staff, ARCS will struggle to achieve the growth this plan seeks. PPC recommends working with ASG to determine the steps required to hire at least one, if not more, full-time staff to sustain not only the day-to-day needs, but the strategic growth of the organization.

## I. Conclusion

This strategic plan should serve as a guide to help ARCS Foundation through decision making around both strategic and tactical questions over the next two years. The plan should not, however, be so rigid as to prevent ARCS Foundation from seizing valuable opportunities as they arise.

The strategic plan expresses the Long Range Planning Committee's recommendations that will enable ARCS Foundation to work toward achieving its vision of establishing the US as *the* global leader in scientific and technological innovation. It should serve as a blueprint for excellence and future growth of ARCS Foundation.

This plan will achieve success through the communication of these strategic goals, the incorporation of them in day-to-day operations, and the allocation of resources to meet the goals identified. In order to ensure successful implementation of the plan, PPC recommends that the Long Range Planning Committee (or a new committee formed as a result of the strategic plan) be responsible for evaluating the progress towards these goals and tasks each quarter. The Long Range Planning Committee will also be responsible for adjusting the plan's timing and the tasks as each fiscal year progresses.

We believe the implementation of these recommendations will enable ARCS Foundation to retain its current strengths while preparing for optimal success.