



Potter League
Enriching Lives

The Potter League Strategic Plan – 2020 to 2023

DRAFT for Board review

October 7, 2019

Planning facilitated by
CAUSE & EFFECT
INC.

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Strategic Planning Team

Board members

Joan Johnson-Freese, Board President
David Enstone, Board Vice President
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Patricia Leonard, Board member
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Planning facilitators, Cause & Effect, Inc.

Jonathan Howard
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Staff members

Brad Shear, Executive Director
Amy Chamard, Director of Operations
Dr. Margee Roberts-Levy, Director of Veterinary Medicine (through July)
Kara Montalbano, Director of Marketing and Communications
Erin O’Gara Dollard, Director of Development
J. Nancy Wrathall, Director of Finance and Administration

Strategic Planning Process

- 2018 - Sustainability Practices Assessment 2018
- February through October 2019 - Planning Team meetings,
- March 2019 - Board and staff survey
- April – June 2019 - 22 Key Informant interviews
 - Animal welfare colleagues and veterinarians
 - National leaders and experts
 - Funders and donors
 - Community and nonprofit leaders
- July 2019 Team agreement on Values, Critical Issues and Program Goals
- August 2019 - Staff work on detailed Program Objectives, subgroup work on revised Mission Statement
- September 2019 - Team agreement on Mission, Program Goals and Program Objectives
- September 2019 - Staff projection of capacity, resource needs and revenue strategy.
- October 3 - Team recommends draft plan for Board consideration –
- *October 15 - Team presents Draft Strategic Plan to the full Board*
- *December 17 - Board decision*

Our Mission Statement

As the heart of a compassionate community, we enrich lives and promote the humane treatment of animals.

How we pursue our mission

- *We shelter unaccompanied companion animals and place them in safe and healthy homes.*
- *We educate the community to embrace humane principals and provide the best care for their pets.*
- *We provide community support programs which help all pet owners provide better lives for their pets.*
- *We expand access to essential veterinary care for companion animals.*

Values and Philosophy

We are guided by these values and beliefs:

- Animals' lives have intrinsic value.
- Relationships between animals and people enhance animals' lives and enrich the human experience.
- Everyone should have the opportunity to form and sustain relationships with companion animals.
- Relationships between animals and people must be founded upon respect, kindness and compassion.
- All people are obliged to meet the standards of the Five Freedoms for all animals in their care.
- We achieve impact through tangible action to care for animals.

The Five Freedoms for Animals

First articulated by the United Kingdom's Farm Animal Welfare Council in 1979

1. Freedom from hunger and thirst

by ready access to fresh water and diet to maintain health and vigor.

2. Freedom from discomfort

by providing an appropriate environment including shelter and a comfortable resting area.

3. Freedom from pain, injury or disease

by prevention or rapid diagnosis and treatment.

4. Freedom to express normal behavior

by providing sufficient space, proper facilities and company of the animal's own kind.

5. Freedom from fear and distress

by ensuring conditions and treatment which avoid mental suffering.

Critical issues

- The success of the humane movement's spay and neuter strategy has greatly reduced the number of wild, stray and abandoned animals in Rhode Island. A majority of rescued pets now offered for adoption by shelters here are transported from other states and disaster areas.
- Reliance on transported animals for adoption creates surges of intake and in the volumes of pets needing behavioral or veterinary care before being made available for adoption. These surges strain our capacity and could compromise the quality of care.
- The future of interstate transport of rescued animals for local adoption is uncertain. It appears likely to continue as a chief source of animals for adoption, but it is also likely to become more and more expensive and difficult to sustain.
- The number and percentage of households with pets is rising, yet many pet owners lack the knowledge, time or means to provide good care and good lives for their pets.
- The lack of accommodations and services for pets can be a major barrier to human access to critical services such as housing, health care, food supplements, domestic violence prevention and other services.
- As many as 75% of all pets receive no veterinary care, largely due to unaffordable costs for lower income pet owners. As a result, animals needlessly suffer and die, while human health is threatened. We estimate that there are at least 45,000 low-income households with pets in Rhode Island in need of supports to ensure animal well-being.
- Our statewide RI Spay and Neuter clinic is close to its maximum capacity. We expect marketing and outreach to underserved communities will create more need and demand for spay and neuter services than we can meet in that facility.
- Rhode Island's veterinary and animal welfare services are geographically fragmented and uncoordinated, leaving major gaps in the statewide network of services and protections for animals.

Program Goal 1: Animal care

Improve animal care and avoid strains on our capacity by ensuring a more consistent flow of rescued animals through our shelter and standardizing our procedures.

Objective 1A: More evenly distribute our intake of rescued animals over time by July 2020*

- Collaborate with other area shelters to split intake from high volume transports.
- Diversify our transport partnerships to reduce the impact if one partner can no longer supply us.
- Explore RI and New England sources for new animals.

Objective 1B. Reduce the average stays in our shelter by 10% by the end of 2023

- Establish intake, triage and limits of care guidelines for behavioral (and veterinarian?) interventions.
- Use paid trainers and/or trained volunteers to speed behavioral progress toward availability for adoption.
- Develop a network of qualified community foster care for animals in need of certain kinds of care before they can be available for adoption.

*** NOTE: All Strategic Plan objectives will be measured from 2019 baselines.**

Program Goal 2: Education and outreach

Increase the impact that our education and outreach programs have on the well-being of animals in Rhode Island.

Objective 2A: Expand our school-based programs to one new district beyond Aquidneck Island by September 2021.

- Survey other humane education school programs in RI.
- Reach out to new schools and districts to understand their needs and processes.
- Determine priority communities.
- Work with receptive schools and districts to adapt existing program to their needs.

Objective 2B: Leverage our veterinary outreach clinics to research, develop and share animal care education for underserved pet owners by May of 2020.

- Conduct an intake assessment of visitors to our outreach clinics at housing and social service sides to understand their knowledge, learning needs and interests in animal care and animal behavior.
- Develop educational methods and media appropriate to this audience and their needs, considering videos in the waiting area, one-on-one coaching, customized classes or other programs.
- Refer visitors to additional Potter League programs and activities for pet owners.
- Use and adapt the Pets for Life Model from Humane Society of the US.

Objective 2C: Create and offer a series of professional education offerings to enhance the quality and unity of purpose among animal care providers in Rhode Island by September 2020.

- Base training content on best practices used at Potter League and needs assessment among provider community.
- Prioritize training for shelter staff at private and municipal shelters in Rhode Island.
- Offer training for secondary audiences such as rescue organizations, groomers, vet techs.
- Engage participants to build consensus and collaboration around animal welfare strategies for Rhode Island.
- Offer two programs per year.

Objective 2D: Increase our positive impact on statewide legislation priorities identified by our Advocacy Committee by January 2020.

- Empower the Advocacy Committee as active volunteers for legislative advocacy on behalf of companion animals.
- Develop a Potter League advocacy network from our wider constituency of clients, volunteers and donors.
- Use contacts with peers and providers to generate a statewide network supporting animal welfare policies.

2E. Improve the volunteer experience and the value of volunteer support by July 2023.

- Improve the long-term participation rate (4 hours X 6 months) of newly trained volunteers from 14% to 25%.
- Continue to individualize the onboarding orientation and assignment process for selective assignment and better matching of volunteer skills and preferences to available volunteer roles.

Program Goal 3: Community support

Expand our community support programs to help all pet owners provide better lives for their pets.

Objective 3A: Complete an assessment of pet support needs among visitors to our outreach clinics by December 2020.

- Determine what people need and want for their relationships with their companion animals (for example vet care, pet behavior, pet care needs)
- Identify which services can have the greatest impact on the quality of companion animals' lives and the most common barriers to access.
- Identify priority services and the channels and methods of service delivery that will be most readily used by underserved pet owners.

Objective 3B: Expand access to Potter League community support programs for lower income pet owners by December 2021.

- Establish a regular (monthly or more often) “popup” presence in outreach sites and communities between clinic days to build familiarity, trust and participation by pet owners.
- Develop or expand programs as needed to respond to the assessment findings.
- Build partnerships with human service agencies for referrals and to help deliver support services to lower-income pet owners.

Objective 3C: Test and develop new models for short- and medium-term foster care for pets who are temporarily unable to remain with their owners by July 2020

- Explore existing models for temporary foster care in private homes and develop and test a pilot foster care program.
- Recruit and train volunteer foster care providers and pilot-test the program.
- Expand and grow the program to meet the need.
- Rely on referral partnerships with human service agencies to verify the need and circumstances of people seeking foster care services.
- Expand the duration of our PetSafe program to meet the typical needs of homeless people and others affected by indeterminate separations from their pets, using foster care as often as possible.
- Develop foster recruitment strategies that include War College and other student outreach.

Program Goal 4: Veterinary and wellness care

Expand access to essential veterinary and wellness care for those unable to pay for the cost of private care.

Objective 4A: Increase the number of people and pets served at our outreach clinics by 20% June of 2022

- Add volunteer and staff capacity to handle larger numbers of pets.
- Add sites or frequency as needed to meet demand.
- Explore adding outreach coordinator to handle clinics and pop-ups.

Objective 4B: Increase the Care Fund expenditures for subsidized veterinary care and services by 40% by June of 2021.

- Explore the potential for additional foundation support and pursue increased funding.
- Seek cost sharing from vets.
- Find other low-cost care if possible and consider helping to expand the Pets in Need program.

Objective 4C: Ensure that our subsidized spay and neuter services are meeting the needs of all communities by Oct 2022.

- Maximize volume at our current facility through process efficiencies and, if needed, added support staff.
- Assess the demographics of people now served by the Spay and Neuter Clinic and identify underserved groups and communities.
- Promote and facilitate the use of our spay and neuter services among pet owners visiting Potter League outreach clinics.
- Reach out to RI municipal animal control offices to collaborate in meeting their residents' needs for subsidized services.
- Prepare to expand or relocate our Warwick facility to meet additional needs at the end of our current lease (Oct. 2022).

Objective 4D: Make an informed decision about including a veterinary clinic in any plan for a new Spay and Neuter Clinic facility by June of 2022.

- Catalog existing subsidized veterinary services in RI and identify gaps in services.
- Evaluate the potential for meeting needs collaboratively with other organizations.
- Review existing models of service and develop a proposed model of service, costs and revenues.
- Assess the impact of expanded veterinary services program on plans and costs for the relocation or expansion of the Spay and Neuter Clinic.
- Explore whether there is sufficient funder and donor support for such an enterprise.
- Assess potential gains and risks and make a decision on whether to proceed.

Capacity needs to achieve these goals

Goal 1: Shelter	Staff capacity needs	Other capacity needs
A. Distribute intake over time	Adds some outreach and coordination tasks with transport and rescue partners.	
B. Reduce average stay	5 FTE Foster Care Assistant added FY 20	External behavioral trainers added FY21
Goal 2. Education	Staff capacity needs	Other capacity needs
A. Expand school programs	.5 FTE Education Assistant added FY20	Added Supplies & Mileage \$3100
B. Outreach education	.5 FTE Outreach Assistant added FY20	
C. Professional education		Outside presenters \$2,000/year
D. Legislation/ advocacy network	Board volunteers	(Possible) Paid Lobbyist \$5,000
E. Volunteers	.5 FTE Volunteer Assistant added FY 20	
Goal 3 Community	Staff capacity needs	Other capacity needs
A. Needs assessment	Volunteers	
B. Expand outreach	Outreach Assistant noted above	
C. Foster Care	Foster Care Assistant noted above	
Goal 4 Veterinary	Staff capacity needs	Other capacity needs
A. Outreach clinics	Outreach/Education Assistant noted above	
B. Referrals for care		
C. S/N service growth		Added surgical costs
D. Vet expansion assessment		TBD: Veterinary Consultant
Administration and Fundraising	Staff capacity needs	Other capacity needs
	1 FT Major Gift fundraising position	\$80,000

Revenue strategies supporting these goals

- 1. Increase annual fundraising income from \$1.47 million (budgeted) in 2020, to about \$2 million in 2023**
 - Add new major gift specialist to provide full time cultivation and recruitment of donors at \$500+ levels.
 - Continue to expand our very successful direct mail program to build a statewide donor base.
 - Foundations –expand grants research and/or grant applications to find support for innovative programs and initiatives.
 - Meeting fundraising targets will eliminate operating deficits by FY23.

- 2. Grow total program revenues from \$1.6 million in 2020 to about \$1.9 million in 2023**
 - Increase Spay/Neuter Clinic volume and related fees.
 - Shorter shelter stays should increase the number of adoptions and the amount of shelter fees.
 - Professional education program may generate some tuition revenue.
 - Assumes municipal contracts will remain at current level, with agreed inflation adjustments
 - Assumes transfers from investments remain at current levels.

- 3. Carefully evaluate commercial enterprise opportunities to build new revenue streams.**
 - The commercial kennel concept being reviewed is not included in this plan as projections have not been completed.
 - Potential enterprises must be judged based on their net revenue potential and how long it will take to achieve break even.
 - Projected net revenue should be compared to alternative investments in the market, in fee-generating programs and in fundraising.
 - Projected enterprise costs must include all costs of management.

Income and expense projection

	FY19 unaudited	FY20	Add	FY21	Add	FY22	Add	FY23	
Revenue									
Shelter Services & Fees	\$324,160	\$382,525	1.0%	\$386,400	1.5%	\$392,200	1.5%	\$398,100	Same # adoptions/ no new revenue sources
Behavior/Training Clinic	\$68,165	\$69,500	1.5%	\$70,500	1.5%	\$71,600	1.5%	\$72,700	
	\$0	\$958,913	1.5%	\$973,300	1.75%	\$990,300	1.75%	\$1,007,600	
Education & Volunteer Contracted Services	\$43,100	\$40,100	1.5%	\$70,700	1.5%	\$71,800	1.5%	\$72,900	Ed. Asst. grows revenue
Fundraising Revenue	\$205,000	\$213,131	1.5%	\$216,300	1.5%	\$219,500	1.5%	\$222,800	
Other Income/Investment transfers	\$1,386,600	\$1,477,950	10.0%	\$1,625,700	10%	\$1,788,300	10%	\$1,967,100	Major Gift position added
	\$152,600	\$151,750		\$151,700		\$151,900		\$152,000	Use of Board Funds unknown
Total Revenue	\$2,179,625	\$3,293,869		\$3,494,600		\$3,685,600		\$3,893,200	

Expenses	FY19 unaudited	FY20	Add	FY21	Add	FY22	Add	FY23	
Program Expenses									
Shelter Ops/Adopter Svs	\$69,500	\$84,050	2.0%	\$85,700	1.5%	\$87,000	2.0%	\$88,700	
Veterinary Expense	\$186,700	\$183,500	2.5%	\$189,500	2.5%	\$194,200	2.5%	\$199,100	Add'l Wellness Clinic supplies
Clinic	\$0	\$393,903	2.5%	\$403,800	2.8%	\$414,900	2.8%	\$426,300	Costs of Add'l Surgeries
Behavior/Training	\$28,600	\$30,360	1.5%	\$43,300	1.5%	\$43,900	2.0%	\$44,800	Add'l Trainer for shelter animals
Education & Volunteer	\$72,620	\$82,860	1.5%	\$87,200	1.5%	\$88,500	2.0%	\$90,300	Add'l supplies/mileage
Total Program Expenses	\$357,420	\$774,673		\$809,500		\$828,500		\$849,200	
Administrative/Fundraising									
Administrative	\$110,600	\$110,020	2%	\$112,200	2%	\$114,400	2%	\$116,700	
Fundraising	\$185,400	\$218,420	2%	\$222,800	2%	\$227,300	2%	\$231,800	
Total Administrative/Fundraising	\$296,000	\$328,440		\$335,000		\$341,700		\$348,500	
Personnel									
Wages & Taxes	\$1,195,100	\$1,836,900	3%	\$2,042,000	3%	\$2,103,300	3%	\$2,166,400	Add: 1 Major Gifts FT and 2 FTE for Outreach/Education and Volunteer/ Foster Care Asst
Benefits	\$137,000	\$205,484	5%	\$225,800	5%	\$237,100	5%	\$249,000	
Total Personnel	\$1,332,100	\$2,042,384		\$2,267,800		\$2,340,400		\$2,415,400	
Occupancy	\$176,800	\$183,490	7%	\$196,300	7%	\$210,000	7%	\$224,700	
Total Operating Expenses	\$2,162,320	\$3,328,987		\$3,608,600		\$3,720,600		\$3,837,800	
Net Operating	\$17,305	-\$35,118		-\$114,000		-\$35,000		\$55,400	
SRP Transfer	-\$35,200	-\$36,900		\$38,800		\$40,700		\$42,800	