



Earth  
Discovery  
Institute

## Earth Discovery Institute Strategic Plan 2020

Earth Discovery Institute  
120 North Park Dr.  
El Cajon, CA 92021

Approved by the Board of Directors on  
September 17, 2020

---



## Our Mission

To inspire stewardship of San Diego's native biodiversity through environmental education and conservation.

## Our Vision

An engaged community, actively supporting the conservation of San Diego's unique biodiversity.

## Our Guiding Principles

***Inclusivity:*** Everyone, regardless of background, deserves equal opportunities to learn about and experience nature. We put this into practice by purposefully engaging communities that lack access to natural places.

***Personal empowerment:*** Individuals are empowered to actively participate in the stewardship of our natural world. We put this into practice by educating people on conservation actions they can implement within their sphere of influence.

***Science:*** We base our initiatives, actions, curricula, and programs on science and current ecological research. We put this into practice by ensuring our work is informed by the best available science, using the scientific method to evaluate the efficacy of our programs, and by partnering with other scientists to support scientific research.

***Stronger together:*** Among our greatest strengths as an organization are the strong partnerships we enjoy with federal and state land management agencies, educators, volunteers, other non-profits, and community partners. We put this into practice by continuing to invest in our existing partnerships, while striving to create new ones.

***Invest in children:*** We invest in children because they represent the next generation of land stewards and decision makers in our communities. We put this into practice by offering youth enriching, science-based outdoor learning experiences aligned with the Next Generation Science Standards (NGSS).

***Inherent value of life:*** From humble bumblebees to majestic mountain lions, all species have value by virtue of their existence, as well as their role in the larger ecosystem. We put this into practice by actively studying, restoring, and protecting San Diego's natural places, while fostering empathy for species these natural places support.

# Our Goals, Strategies, and Objectives

## Organizational Capacity (OC)

### Goal OC 1: Develop board capacity and engagement

**Strategy OC 1.1:** *Within 60 days<sup>1</sup>, the Board of Directors (BOD) will self-organize into committees comprised of at least 2 members each, serving a minimum 1-year term.*

**Objective OC 1.1a:** Develop a **Communications and Networking Committee** dedicated to generating awareness and support for our work in the public sphere (*see Communications and Networking section for specific tasks*).

**Objective OC 1.1b:** Develop a **Board Development Committee** that will be responsible for Board member recruitment and retention (*see Board Development section for specific tasks*).

**Objective OC 1.1c:** Develop a **Resource Development Committee** that will work with the Executive Director (ED) to diversify our funding stream and elevate our annual budget to \$500,000 *within 3 years* (*see Resource Development section for specific tasks*).

**Strategy OC 1.2:** *The Board Development Committee will lead efforts to ensure the BOD is continuously comprised of between 5 and 9 engaged members, who are not staff, whose areas of expertise help meet our stated goals, and who reflect the diversity of the communities we serve.*

**Objective OC 1.2a:** Transition staff off the BOD *within 120 days*.

**Objective OC 1.2b:** *Board Development Committee and ED will develop a BOD orientation packet that includes policies and procedures, BOD roles and responsibilities, BOD member agreement, bylaws, BOD and staff profiles, strategic plan, financial overview, and committee information. Committee will ensure all relevant materials are available on the Google drive. The orientation packet will be completed within six months.*

**Objective OC 1.2c:** *Board Development Committee will recruit 2-3 new board members within the next 2 years that have significant board leadership experience, fundraising capacity, or represent an under-resourced community we serve. Board Development Committee will work with Communications and Networking Committee to help identify potential board members through outreach with Rotary clubs, membership at Black Chamber of Commerce, etc.*

---

<sup>1</sup> Unless otherwise noted, timelines are based on plan approval.

**Objective OC 1.2d:** *Board Development Committee* will organize at least quarterly enrichment activities for board members (i.e., hiking and/or restoration days, board leadership and education workshops), *within 30 days*.

**Goal OC 2:** Ensure we have long-term organizational stability and infrastructure.

**Strategy OC 2:** *Upon approval of this plan*, continue to add to our administrative record of institutional knowledge, create and update staff policies and procedures, and procure facilities and equipment to support programming goals and objectives.

**Objective OC 2.1:** Develop policies and procedures for staff retention and growth including Duty Statements, Contracts, Benefits statement, Annual Reviews, and Independent Development Plans. *ED will complete* these policy and procedural documents *within 120 days*.

**Objective OC 2.2:** *For each fiscal year*, ensure that *staff Project Directors, together with ED*, write *annual* reports summarizing accomplishments and present to the BOD at the annual meeting.

**Objective OC 2.3:** For all programs, *ED and staff* will prepare *annual* work plans *prior to the start of each fiscal year*.

**Objective OC 2.4:** *Within 2 years*, purchase a vehicle (\$35,000- \$50,000) by leveraging funds from grants, corporate sponsorships (i.e., SDGE), fundraising, and/or any method deemed appropriate by the *Resource Development Committee and the ED*.

**Objective OC 2.5:** Create at least one space to support both the education and outreach programs (e.g., learning center at Crestridge ER). *Resource Development Committee, ED, and BOD President will coordinate installation/construction of the space, as soon as practicable*.

**Objective OC 2.6:** *ED* will develop a central database that is accessible to staff and BOD for long-term retention of the administrative record, forms, policies, and procedural documents. This includes the organization of documents currently stored in the Google drive. *ED* will train BOD and staff to use the system *within 60 days*. *ED and BOD will continuously* update Google drive, as appropriate.

**Objective OC 2.7:** *Board Development Committee* will create an annual calendar of events that includes the annual meeting date, board recruitment timelines, and other duties as assigned *within 120 days*. The annual calendar will be presented to *BOD for approval during the annual meeting*.

**Objective OC 2.8:** *Resource Development Committee* and *ED* will develop a budget *within next 6 months* to transition current Outreach Director/Biologist into a part-time role overseeing the Western Monarch Butterfly and Milkweed Recovery Project, and hire a new Restoration Ecologist/Citizen Science Coordinator. *ED* will hire a Restoration Ecologist/Citizen Science Coordinator *within next 12 months*.

## Communication & Networking (CN)

### **Goal CN 1: Generate awareness and support for EDI's work in the public sphere**

#### **Strategy CN 1.1: Brand EDI**

**Objective CN 1.1a:** *Within 120 days, ED will oversee redesign of website, which will include 1) general information about EDI, its programs, its staff, and BOD; 2) educational tools to empower individuals to protect biodiversity; 3) the importance of biodiversity; 4) the importance of San Diego as a biodiversity hotspot; 5) how and why San Diego's Multiple Species Conservation Program (MSCP) preserve differs from other protected areas, and 6) how our work intersects with climate change mitigation/adaptation.*

**Objective CN 1.1b:** *Within 120 days, ED will present options to the BOD for a new logo.*

**Objective CN 1.1c:** *As needed, ED will order new t-shirts and other merchandise for use during events and as fundraising tools.*

**Objective CN 1.1d:** *Staff will maintain social media accounts with at least 2 posts per week.*

#### **Strategy CN 1.2: Market EDI**

**Objective CN 1.2a:** *Within 60 days, ED will develop a "case statement" in support of EDI.*

**Objective CN 1.2b:** *Within 60 days, ED and staff will develop community education materials for all EDI projects and/or programs for use at outreach events and speaking engagements (e.g., western monarch butterfly recovery project).*

**Objective CN 1.2c:** *Within 60 days, Communications and Networking Committee and ED will inventory existing Rotary chapters, community planning groups and other nonprofit community service groups whose priorities and projects might include concerns about the future of East County's natural communities.*

**Objective CN 1.2d:** *Within 90 days, Communications and Networking Committee and ED will contact appropriate service groups, as mentioned above, to schedule presentations on our mission, programs, and projects.*

**Objective CN 1.2e:** *Staff will deliver short community education presentations, 6 times per year, to service clubs, community planning groups, and other non-profit organizations about our mission, programs, and current projects, in an effort to seek community participation and support.*

**Objective CN 1.2f:** *ED and/or BOD President will give presentations, opportunistically, to community leaders (i.e., county board of supervisors, mayors, and other elected officials), about our priority projects with a clear call to action.*

**Objective CN 1.2g:** *Communications and Networking Committee and staff* will continue to host one native plant sale *per year*.

**Objective CN 1.2h:** *ED and staff* will produce four newsletters *per year* with program/project updates and will circulate electronically to all known stakeholders, potential donors, and eventually, members.

### **Strategy CN 1.3: Network with community leaders**

**Objective CN 1.3a:** *Within 60 days, each BOD* will document and inventory any professional/personal role, history, and relationship with local elected officials, community planning groups, service clubs, and other community leaders. *Communications and Networking Committee and ED* will determine how best to use this information for the promotion of our mission, programs, and projects.

**Objective CN 1.3b:** *Within 60 days, Communications and Networking Committee and ED* will identify key conservation allies, groups, elected officials including candidates for office, and public agencies, which staff or BOD participation/collaboration is useful (e.g., San Diego Management and Monitoring Program, San Diego Pollinator Alliance, San Diego River Park Foundation, and friends organizations). Assign contact responsibility to staff and BOD, as needed.

### **Strategy CN 1.4: Engage news media to cover our programs and events**

**Objective CN 1.4a:** *Within 60 days, Communications and Networking Committee and ED* will research and inventory media outlets, editors, and reporters focused on East County and/or those concerned with conservation/science/nature (i.e., Nan Sterman's on KPBS, East County Magazine Podcast).

**Objective CN 1.4b:** *Within 60 days, Communications and Networking Committee* will inventory staff and BOD roles, histories, and relationships with local journalists.

**Objective CN 1.4c:** *Communications and Networking Committee and ED* will identify potential "hooks" for content submission to the appropriate journalist/outlet. Potential article ideas include a personal story about EDI from a volunteer, past student, or teacher that participated in the 4th grade program, the outdoor day camp that will be offered in October 2020, the western monarch recovery project, the elementary school garden project, and the sensory garden that we are helping to install on federal refuge lands. The first article will be pitched *within 90 days*. In addition, *every Communications and Networking Committee meeting* will allot time on the agenda to brainstorm potential story ideas with the *intent of publishing at least 4 articles per year*.

**Objective CN 1.4d:** *When there is available funding*, consider hiring a media consultant to increase EDI visibility with the general public. In the meantime, to fill this role, BOD may consider a media internship for a local college student whose major is communications or journalism.

**Strategy CN 1.5: Participate in decision-making processes relevant to conservation and education in San Diego County.**

**Objective CN 1.5a:** *Within 120 days, the Communications and Networking Committee will develop a proposal for BOD consideration regarding a public advocacy policy. This policy will determine our advocacy role, potential advocacy causes (e.g., land conservation, climate change adaptation/mitigation, fire management, species conservation, and MSCP Preserve issues).*

**Objective CN 1.5b:** *On a monthly basis, Communications and Networking Committee and ED will engage appropriate BOD and staff to identify emerging public sector decision-making issues and processes relevant to our mission (i.e., conservation and education).*

**Objective CN 1.5c:** *On a monthly basis, the Communications and Networking Committee will stay apprised of the County Board of Supervisors' agenda/calendar, and as appropriate, other jurisdictional decision-making meetings. The Committee and ED will assess the feasibility of our effective participation on agenda items relevant to our mission. All such items will be discussed during Committee meetings and reported to the BOD. In addition, the Communications and Networking Committee will keep BOD and staff informed of all final decisions on agenda items relevant to our mission either via written summaries available on the Google drive or through BOD minutes.*

**Resource Development (RD)**

**Goal RD 1: Create sustainable financial plan and fundraising strategy that includes diverse funding streams.**

**Strategy RD 1.1: Engage corporate sponsors**

**Objective RD 1.1a:** *Within 60 days, Resource Development Committee and ED will inventory potential corporate sponsors.*

**Objective RD 1.2b:** *Within 6 months, Resource Development Committee and ED will share responsibility for contacting all identified corporate sponsors.*

**Objective RD 1.3c:** *The Resource Development Committee and staff will design and market a corporate volunteer program to support restoration on partner agency-owned lands. Pending County health guidelines, these events will be offered *four times each year*.*

**Strategy RD 1.2: Engage private donors**

**Objective RD 1.2a:** *Upon plan approval, ED will continue to ensure that we earn highest possible scores on charity-rating websites (i.e., Charity navigator).*



**Objective RD 1.2b:** *Within 60 days, BOD and ED will produce a list of individuals they know personally (including volunteers) or professionally that could be contacted regarding membership or donations.*

**Objective RD 1.2c:** *Within 6 months, achieve 100 percent BOD “giving” by requesting that each member makes an annual contribution to EDI that is personally meaningful.*

**Objective RD 1.2d:** *Within 120 days of completing Objective RD 1.2b, the Resource Development Committee and ED will work together to contact all identified potential donors. The method of contact will vary according to the nature of each individual’s relationship with EDI.*

**Objective RD 1.2e:** *The Resource Development Committee and ED will include an appeal for donations in every newsletter and during Giving Tuesday events.*

**Objective RD 1.2f:** *Within 30 days, ED will ensure EDI is listed as a charity on Amazon Smile, and will then promote it on our social media accounts, during holidays, and as appropriate*

**Objective RD 1.2g:** *Within 60 days, ED will contact local merchants in an effort to have “rounded-up” donations given to EDI.*

**Objective RD 1.2h:** *Within 60 days, the Resource Development Committee and staff will develop a membership program that offers different sponsorship levels and associated benefits (e.g., merchandise, private guided hikes, and glass-making class with Diana).*

### **Strategy RD 1.3: Fundraising events**

**Objective RD 1.3a:** *Within 6 months, the Resource Development Committee and staff will create a virtual 5K to benefit EDI. Communications and Networking Committee will help promote the event.*

**Objective RD 1.3b:** *Within two years, the Resource Development Committee and ED will plan and host a major fundraising event, which could be coordinated with a capital campaign.*

### **Strategy RD 1.4: Apply for grants**

**Objective RD 1.4a:** *Within 60 days, the Resource Development Committee and ED will create an inventory and database of grant opportunities available through government agencies and private foundations, with the minimum funding amount of \$15,000.*

**Objective RD 1.4b:** *The Resource Development Committee and ED will share responsibility for applying for a minimum of eight grants per year. All grant proposals will use a consistent funding formula that includes “real costs” of each program.*

**Objective RD 1.4c:** The *Resource Development Committee and ED* will share responsibility for keeping information regarding generated revenue, sponsorships, membership, and donors *continually updated* and available to BOD and staff on the Google drive.

### **Strategy RD 1.5: Fee-based programming**

**Objective RD 1.5a:** *Staff* will develop a summer day camp program that will begin in *June 2021*, to be implemented on partner agency-owned lands (e.g., Crestridge Ecological Reserve).

**Objective RD 1.5b:** *Staff* will develop special membership award events (e.g., hikes on partner agency-owned lands) that could start in *January 2021*, pending County health restrictions. However, no such event would charge an individual for access to public lands.

### **Goal RD 2 Resource management and auditing**

**Strategy RD 2:** The *Resource Development Committee* will form a sub-committee responsible for financial management and record keeping.

**Objective RD 2.1:** *Within 120 days*, the *Resource Development Sub-committee and ED* will coordinate an audit or review for previous fiscal year, to evaluate internal controls and record keeping, ensuring they would meet the expectations of an auditor.

**Objective RD 2.2:** *ED* will reconcile receipts and deposits with bank statements, and *Resource Development Sub-committee* will oversee accountant to produce *monthly* and *annual* budget/actual reports.

**Objective RD 2.3:** *Staff* will *continuously* track expenditures by uploading copies of all receipts to Google drive. *Staff* will ensure expenditures comply with funding guidelines and grant agreements.

**Objective RD 2.4:** The *Resource Development Sub-committee and ED* will produce and propose *annual* budgets for BOD approval.

**Objective RD 2.5:** *Within 60 days*, the treasurer will develop fiscal policy procedures for BOD approval.

## Programs

### **Goal P 1: Conserve native biodiversity**

**Strategy P 1.1:** To garner public support and visibility for EDI, focus on rare flagship and umbrella species. We will focus our initial efforts on the conservation of western monarch butterfly (*Danaus plexippus plexippus*) and its host plant, narrow-leaved milkweed (*Asclepias fascicularis*). After we have built public awareness and support for our role in western monarch butterfly conservation, we can expand to what may be less known, rare and declining native species.

**Objective P 1.1a:** Strengthen our partnership with San Diego Pollinator Alliance, U.S. Fish and Wildlife Service, San Diego Natural History Museum, San Diego Zoo Global, Monarch Joint Venture, and other stakeholders working on western monarch butterfly conservation in San Diego County. The goal of these partnerships is to develop a regional strategy for conserving western monarch butterfly, which includes the growing and distribution of its host plant, narrow-leaved milkweed. *ED* will ensure EDI is represented at every San Diego Pollinator Alliance meeting going forward, and *Outreach Director and ED* will continue to update and solicit updates with partners. *Outreach Director/Biologist* will continue overseeing this project.

**Objective P 1.2b:** *Staff* will work with partners to develop online content, videos, and printable resources that deliver a consistent message about the status of the western monarch butterfly, its role in the local ecosystem, specific actions people can take to help this species recover (i.e., plant milkweed in their yards) as well as other pollinator species (i.e., reduce use of pesticides). *Educational resources are currently being developed and will go online with launch of new website (see Objective CN 1.1a).*

**Objective P 1.3c:** *ED and Communications and Networking Committee* will inform the public of our western monarch butterfly conservation efforts by soliciting coverage in the media. All media coverage of this project will emphasize how private individuals can help facilitate the recovery of the western monarch butterfly (see Strategy CN 1.4). *ED has already sent one article to the San Diego Union Tribune, and other efforts are ongoing.*

**Objective P 1.4d:** A narrow-leaved milkweed seed farm was established in 2020 at the Lakeside Downs property located in Lakeside. This farm was established with the intent of developing a San Diego County seed bank. The *ED* lives on the property and currently maintains the seed farm, while the *Outreach Director/Biologist* manages the project.

**Objective P 1.5e:** The current Outreach Director/Biologist will be replaced within *the next 12 months (see Objective OC 2.8)* ; however, she will continue to oversee the western monarch recovery project.

**Objective P 1.6f:** *Staff will continuously track results of the western monarch butterfly project by recording the 1) success rate of EDI plantings over 1, 2 and 3 years; 2) number and success rate of supported restoration projects over 1, 2 and 3 years; 3) number of plants distributed to growers; 4) number of growers; 5) number of downloads of online resources (video and information sheets); and 6) number of published media articles and presentations with approximate reach of each.*

**Strategy P 1.2:** Conduct ecological restoration on conserved land.

**Objective P 1.2a:** Continue partnering with land management entities to coordinate planting of native species, through volunteer events and as part of education curriculum.

**Infrastructure needed:** *A vehicle is needed for project implementation (see Objective OC 2.4).*

**Additional staff needed:** *A Restoration ecologist/ citizen science coordinator needs to be hired to take over responsibilities of Outreach Director, who currently oversees this program (see Objective OC 2.8)*

**Objective P 1.2b:** *Staff will work with our partner agencies to develop written three-year plans for each restoration area/project (i.e., watering, weed management, etc.), with clear funding and staff allocation. In advance of any new future restoration projects, three-year restoration and maintenance plans will be developed and approved by the ED, Outreach Director and landowner.*

**Objective P 1.2c:** *Staff will track results of restoration projects including date of planting, acreage, number of each species planted, and survival rates after years 1, 2, and 3. Photo documentation of the site before planting and at years 1, 2, and 3 will also be done, if feasible. Finally, all animal species seen using the restoration site will be recorded, as well as any natural recruitment of native plant species.*

**Objective P 1.2d:** *Staff will engage the community and volunteers in seasonal seed collecting and cleaning, for planting on conserved lands, distributing to students, and sharing with partner agencies; species selected are based on restoration needs.*

**Goal P 2: Integrate science more deeply and explicitly into our work**

**Strategy P 2:** Partner with conservation science practitioners currently working in San Diego County.

**Objective P 2.1:** Build on current citizen science projects (iNaturalist/SEEK/Nature's notebook), to support researchers collecting data on phenology, native pollinator species, rare and endangered species, and other MSCP Preserve research needs. *ED will develop and launch at least one new Citizen Science project within 12 months.*

**Objective P B-1.2:** Partner with Conservation Biology Institute, San Diego Management and Monitoring Program, and other partners to plan habitat restoration and/or monitoring to support recovery of rare/listed species. *ED* will develop and launch at least one new related project *within 12 months*.

**Goal P 3: Inspire the next generation of scientists and conservationists.**

**Strategy P 3:** Engage kids and families from under-resourced communities in East/Southeast San Diego County in science-based outdoor education

**Objective P 3.1:** *Staff* will design a school-based day camp for 4<sup>th</sup>/5<sup>th</sup> grade students, to begin in October 2020. The program will be offered first at Crestridge Ecological Reserve and expand to San Diego National Wildlife Refuge, pending permission.

**Infrastructure needed:** *A temporary shade structure will be necessary immediately, with the aim of building a permanent structure within 12 months (See Objective OC 3.5), as well as a bathroom/hand-washing facility.*

**Additional staff needed:** *One part-time education instructor (i.e., Seekey) to support Education Director.*

**Objective P 3.2:** *Staff* will continue the NGSS-based environmental education program with 4<sup>th</sup>/5<sup>th</sup> grade students from Southeast San Diego County that promotes hands-on science and habitat restoration activities, pending County health restrictions.

**Additional staff needed:** *8-10 part-time field instructors*

**Objective P 3.3:** *Staff* will design the summer camp program, which will begin in June 2021.

**Infrastructure needed:** *Same as day camp; see Objective P 3.1.*

**Additional staff needed:** *5-6 part-time field instructors*

**Objective P 3.4:** *ED* will develop scholarship program for a minimum of 2 high school students from Southeast San Diego County, with the first awards granted *in the 2021 school year*.

**Objective P 3.5:** *Staff* will design “Nature at Home” packets for 350 students at Casa de Oro throughout the 2020/21 school year. *Staff* will consider expanding to additional schools pending administrative support, funding, and staff capacity.

**Goal P 4: Engage communities in understanding, enjoying, respecting, and protecting San Diego’s native biodiversity and habitats.**

**Strategy P D-1:** *Staff* will create self-guided opportunities for individuals to learn about nature.

**Objective P D-1.1:** *The Education Director will create and install four “Storywalks” in 2020/2021. At least one will be installed at Crestridge Ecological Reserve and one at Hollenbeck Wildlife Area. In addition, ED will seek permission from the U.S. Fish and Wildlife Service regarding installation of a Storywalk at the San Diego National Wildlife Refuge.*

**Objective P D-1.2:** *Outreach Director/Biologist will develop a native habitat garden at the San Diego National Wildlife Refuge. At present, the timeline for this project is unknown as it depends on U. S. Fish and Wildlife Service leadership and access to water at the site.*

**Objective P D-1.3:** *Outreach Director will create themed nature hikes, which will be held after work and on weekends, starting January 2021. These hikes will be led by staff or BOD members. Outreach Director will coordinate these walks with the Resource Development Committee to develop fee structure and integrate activities with membership program.*

**Objective P D-1.4:** *Staff will participate in fairs and community events, opportunistically, to engage the general public in learning about EDI’s mission, its current programs and projects, the importance of species conservation, the role of the MSCP Preserve and other protected lands, and the local opportunities to experience nature. Staff will collect contact information of event participants, and ensure they are on our email/newsletter list.*

**Objective P D-1.5:** *Outreach Director will lead efforts to create interpretive signs for use on protected lands, on an as-needed basis. These signs will include information about habitats, species, and ongoing recovery-type projects. Outreach Director will complete interpretive signs for San Diego National Wildlife Refuge within 120 days.*

**Objective P D-1.6:** *Staff will host public presentations about native species and habitats, beginning January 2021. These presentations can either be indoor or outdoor at Crestridge Ecological Reserve, but will depend on County health restrictions.*

**Objective P D-1.7:** *Staff will conduct outreach on conserved lands, on an as-needed basis, to inform the public about specific conservation initiatives, citizen science projects, and agency priorities.*