A. J. Muste Institute’s Mission

We support grassroots nonviolent radical activism for the liberation of all.
Building on our distinctive capabilities…

Five decades of experience
Ability to remain focused on grassroots organizing while looking at a range of issues
Multifaceted approach to how change happens
Building of long-term community-based activist organizations
Belief in civil disobedience and direct action at the local level leading to social change
Emphasis on peace and non-violence in movement building
A Board that is deeply involved in the work
Our sheltering mission
International and national in scope
Nimbleness and willingness to pivot to strategically address issues that need to be addressed

…we conduct high-impact activities…

Funding high-potential grassroots and direct-action radical activist groups
Sheltering organizations, providing affordable space (and sanctuary) and supporting and bringing groups together
Building community among organizations through communications, events, and provision of event space
Providing fiscal sponsorship of groups aligned with our mission

…to achieve…

Organizations can realize critical projects
Organizations increase their capacity
Organizations are more visible
Organizations have access to low-cost meeting and working spaces
Organizations are able to collaborate, exchange knowledge, and mutually support each other
New organizations aren’t bogged down in bureaucracy, allowing organizations to raise tax-deductible funds

…to create a world in which…

High-potential grassroots and direct-action radical activists primarily in the U.S. that are focused on nonviolence and social justice work are more sustainable and have a greater impact.

AJ Muste Institute’s Theory of Change
# A.J. Muste Institute
## Strategic Plan 2022-2025

<table>
<thead>
<tr>
<th>Strategic Priorities</th>
<th>Initiatives</th>
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</table>
| **1. Sheltering**    | 1.1 Restart real estate search process and find a new space  
2.1 Institute regular review of grants after every cycle  
2.2 Institute annual review of grantmaking program  
2.3 Form committee to gather and analyze data and make recommendations  |
| **2. Grantmaking**   | 2.1 Institute regular review of grants after every cycle  
2.2 Institute annual review of grantmaking program  
2.3 Form committee to gather and analyze data and make recommendations  |
| **3. Engagement**    | 3.1 Develop internal and external communications strategy  
3.2 Increase communications capacity and expertise  
3.3 Facilitate programming in the space, including cross-organizational training and capacity building  |
| **4. Sustainability**| 4.1 Undertake a board development process  
4.2 Develop strategy for fundraising and marketing to individual donors and potential partners  
4.3 Increase fundraising capacity and expertise  |

1. Redefine and relaunch a new sheltering program that embraces innovation and prioritizes community building
2. Implement a more responsive and dynamic model of grantmaking
3. Develop a multi-faceted internal and external engagement strategy that builds community, increases our visibility, and supports our fundraising
4. Increase fundraising efforts to ensure our long-term sustainability
Appendices
KPIs and Objectives

The Institute commits to the following achievements, which will define success over the next three years.
# Key Performance Indicators

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<tbody>
<tr>
<td><strong>KPIs</strong></td>
<td>• A new space</td>
<td>• Grants Program Review Committee</td>
<td>• New branding</td>
<td>• Fundraising plan</td>
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<td></td>
<td>• Administrative systems overhaul</td>
<td>• # of reviews of grants made and the grants program</td>
<td>• Communications plan</td>
<td>• # of board member contacts</td>
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<td></td>
<td>• # of sheltered organizations (and types)</td>
<td>• Increase in grantees satisfaction (quantitative and qualitative feedback)</td>
<td>• % increase in social media engagement</td>
<td>• % of board giving</td>
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<tr>
<td></td>
<td>• # of organizations that use the space</td>
<td></td>
<td>• % increase in website visits</td>
<td>• Fundraising committee</td>
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<td></td>
<td>• # of trainings per year</td>
<td></td>
<td>• Engagement scores with sheltered organizations (quantitative and qualitative feedback)</td>
<td>• % increase in donations (# and $)</td>
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<tr>
<td></td>
<td>• Increase in sheltered group satisfaction (quantitative and qualitative feedback)</td>
<td></td>
<td>• # of events in the space per year</td>
<td>• % increase in grants received (# and $)</td>
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<td></td>
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<td>• # of organizations in the database</td>
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## Objectives

<table>
<thead>
<tr>
<th>Strategic Priority</th>
<th>Year 1 [6/30/2023]</th>
<th>Year 2 [6/30/2024]</th>
<th>Year 3 [6/30/2025]</th>
<th>Staff and Board Member(s) Accountable</th>
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</table>
| 1. Relaunch sheltering program                       | • A new space is identified and built out  
• New systems and protocols for tenants and users put in place  
• Staffing plan for new space created  
• Administrative systems audits are finished                                                                                                                                                                                                                                           | • First class of tenants welcomed  
• Shelter at least 3 anchor groups and 6 floating groups  
• Staff for new space are hired  
• Implement overhaul of administrative systems  
• Implement changes based on sheltered group feedback                                                                                                                                                                                                                              | • Evaluate space systems and protocols  
• Shelter at least 3 anchor groups and 6 floating groups  
• Implement changes based on sheltered group feedback                                                                                                                                                                                                                             | • Heidi, Daniel, Board Executive Committee                                                                                                                                                                                                                                                                               |
| 2. Implement a more responsive and dynamic model of grantmaking | • Form grants program review committee and establish its charter  
• Institute and routinize review process of each cycle  
• Institute and routinize review process of program annually  
• Include feedback from grantees in the report form                                                                                                                                                                                                                                                                       | • Implement recommendations from committee and grantee feedback  
• Conduct regular review cycles  
• Engage grantees in program evaluation                                                                                                                                                                                                                                                                              | • Implement recommendations from committee and grantee feedback  
• Conduct regular review cycles  
• Engage grantees in program evaluation                                                                                                                                                                                                                                                                              | • Grants program review committee chair                                                                                                                                                                                                                                                                                 |
| Strategic Priority | Year 1  
[6/30/2023] | Year 2  
[6/30/2024] | Year 3  
[6/30/2025] | Staff and Board Member(s) Accountable |
|-------------------|--------------|--------------|--------------|----------------------------------|
| 3. Develop a multi-faceted internal and external engagement strategy that builds community, increases our visibility, and supports our fundraising | • Communications plan developed, ensuring sheltered groups are included  
• Branding project launched  
• Develop plan for maximizing website  
• First floor communications meetings established  
• Develop and approve protocols for events  
• Find and have ready insurance coverage  
• Have ready online booking system  
• Have groups identified and sign agreements | • Branding project concluded  
• Website revamped  
• Continue floor communications meetings  
• Explore options including hiring communications manager/organizer, training current staff and board  
• Growing “shared public display” of partnerships  
• Have at least 6 trainings and events | • Continue floor communications meetings  
• Growing “shared public display” of partnerships  
• Have at least 12 trainings and events  
• Evaluate trainings and events  
• Evaluate 2nd year | • Heidi and Daniel (transition to communications staff) |
| 4. Increase fundraising efforts to ensure the organization’s long-term sustainability | • Fundraising training for board members  
• Board members have contacted 5 donors each  
• All board members have made contributions  
• Form fundraising committee and develop charter  
• Fundraising plan completed | • Board members have contacted 10 donors each  
• All board members have made contributions  
• Fundraising plan implemented | • Board members have contacted 15 donors each  
• All board members have made contributions  
• Evaluate and modify fundraising plan | • Fundraising committee chair |
Talent and Budget Requirements
## Talent Requirements

What talent requirements (staff, volunteer, or Board) will you have for each year? What new positions will you need? What staff shifts will be necessary?

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<tbody>
<tr>
<td>1. Relaunch sheltering program</td>
<td>• Engage pro bono lawyer to review updated protocols</td>
<td>• We will need more staff but exactly how much and duties TBD</td>
<td>• We will need more staff but exactly how much and duties TBD</td>
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</table>
| 2. Implement a more responsive and dynamic model of grantmaking | • Grants Program Review Committee  
• Staff to administer annual evaluations/surveys | • Grants Program Review Committee  
• Staff to administer annual evaluations/surveys | • Grants Program Review Committee  
• Staff to administer annual evaluations/surveys |
| 3. Develop a multi-faceted internal and external engagement strategy that builds community, increases our visibility, and supports our fundraising | • Hire someone with very good organizational and management skills temporally to maybe move to permanent full time  
• Engage Communications consultant | • Staff to manage new space and activities.  
• We need staff with skills and time to implement and manage plan | • Staff to manage new space and activities.  
• We need staff with skills and time to implement and manage plan |
| 4. Increase fundraising efforts to ensure the organization’s long-term sustainability | • Hire fundraising consultant/trainer. | • Staff to manage fundraising plan | • Staff to manage fundraising plan |
## Budget Implications

These are the financial resources that will be needed each year to implement this plan:

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<tbody>
<tr>
<td>1. Relaunch sheltering program</td>
<td>• $7-9M [new space]</td>
<td>• $500K [maintenance]</td>
<td>• $500K [maintenance]</td>
</tr>
<tr>
<td></td>
<td>• $100K [staff person + benefits]</td>
<td>• $100K [staff person + benefits]</td>
<td></td>
</tr>
<tr>
<td>2. Implement a more responsive and dynamic model of grantmaking</td>
<td>• n/a</td>
<td>• n/a</td>
<td>• n/a</td>
</tr>
</tbody>
</table>
| 3. Develop a multi-faceted internal and external engagement strategy that builds community, increases our visibility, and supports our fundraising | • ½ year of 75% of 2nd new staff person (admin assistant) $15,000 + benefits.  
• ~$10,000 for communications consultant. | • 75% of 2nd new staff person (admin assistant) $15,000 + benefits.  
• 25% of development staff salary. $20,000 + benefits  
• 25% of 2nd new staff person (admin assistant) $15,000 + benefits. | • 75% of 2nd new staff person (admin assistant) $15,000 + benefits.  
• 25% of development staff salary. $20,000 + benefits  
• 25% of 2nd new staff person (admin assistant) $15,000 + benefits. |
| 4. Increase fundraising efforts to ensure the organization’s long-term sustainability | • ~$50,000 for fundraising consultant.  
• 3/4 year of 75% of development staff salary. $20,000 + benefits | • 75% of development staff salary. $20,000 + benefits | • 75% of development staff salary. $20,000 + benefits |
Monitoring and Evaluation

This strategic plan will serve as the guiding document for the activities of the organization. The Institute will continuously monitor and regularly evaluate the actions taken—or not taken—as outlined in this strategic plan.

**Annually**

- At the beginning of each year of the strategic plan, the ED will assign a responsible member of the staff or board with respect to each initiative, working with them to develop objectives (and, if appropriate, action plans). Objectives should be specific, measurable, achievable, relevant, and time-based.

- The ED will present objectives (and, if appropriate, action plans) to the Strategic Planning Committee of the Board. The Strategic Planning Committee provides an annual update for the Board, asking the key question, “Are we going in the right direction?”

**Quarterly**

- At least quarterly, the ED, in consultation with the responsible staff or board, will present to the Strategic Planning Committee an assessment and analysis of the progress with respect to each objective associated with each initiative, making course corrections, as necessary, and answering the key question, “Are we making the progress we set out to have?”

**Monthly**

- Once a month, the responsible staff or board member will report to the ED about developments on the accomplishment of action-plan items, making course corrections, as necessary, and answering the key question, “Did we do what we said we would do?”
<table>
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<tr>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Opportunities</th>
<th>Threats</th>
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</table>
| • 50 year history  
• financial stability  
• network of grassroots groups we’ve funded  
• depth of organizing experience  
• engaged and experienced board  
• good reputation  
• commitment to social change  
• stable and capable staff  
• extensive relationships with radical communities  
• casting a wide net  
• savings as a result of lack of physical space | • shortstaffed (inc. communications)  
• Inconsistent communication and relationships with the network  
• inconsistent communication with donors, funders, potential funders  
• casting too wide a net so as to lack focus and depth (without enough capacity to do so)  
• rhetorical limitations (in terms of vocabulary and obsolete language)  
• need for broader board development (inc. finance, communications, etc.)  
• branding problem (name, Muste, Institute)  
• lack of awareness of organization and work; need for strategic communications; inc. better use of social media  
• need for fundraising strategy as a re-funder  
• lack of physical space  
• Lack of term limits  
• Aging board | • mutual aid movements we can potentially support and tie in to  
• new radical organizing environment that could benefit from our support and history  
• increased awareness of interconnectedness of movements; greater sense of planetary interconnection (COVID, climate, etc.)  
• shift to new forms (inc. virtual) organizing gives more options  
• rise of right wing  
• Ability to hire new staff | • rise of right wing in all its forms; rising authoritarianism  
• increased violence (as a result of rise of right wing)  
• fractured political left  
• cyberthreats  
• increased polarization (inability to hear one another and work across difference)  
• increased legislation criminalizing protest; anti-democratic legislation; lawfare (shift in legal landscape)  
• fake news, disinformation, alternative facts  
• vulnerability to lawsuits  
• aging donor base |