



Strategic Plan

2015-2025



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Introduction

The Blue Bell Foundation for Cats has a rich history in the City of Laguna Beach and as Orange County's first retirement cat sanctuary. The challenge today is to take the transformative steps necessary to ensure our long-term future.

In 2013 -- the 25th anniversary of our founding -- we launched a Strategic Assessment as the first step of a two-year strategic planning process. The assessment began with a series of confidential interviews with current and past stakeholders and included a thorough review of all relevant Foundation documents. The topics included Financial Strength and Performance, Governance, Facilities, Grounds & Gardens, Fund Raising, Marketing, Communications and Community Relations. A review of Cat Care, staffing, volunteer program, standards, policies and procedures, business practices, tax status, legal exposure and investment management will be undertaken in the future as part of this plan.

The first outgrowth from this process was the development of new mission, vision and values statements, market positioning and branding (including logo, tagline and color scheme) as key foundational elements that clearly define Blue Bell's purpose and desired future.

The objective of this Strategic Plan is to determine our short and long-term goals and the strategies necessary to achieve them. Our strategic goals are organized by relevant category and support achievement of our ambitions to fulfill our mission in perpetuity and realize our vision to become the leading cat retirement sanctuary.



Mission, Vision & Values

Our new Mission, Vision & Values statements took over a year to develop -- and for good reason -- they must convey a crystal clear message of Blue Bell's purpose, principles and aspirations. They also serve as guiding lights for all of our future plans, goals, strategies and decisions.

Our Mission

The Blue Bell Foundation for Cats offers loving and compassionate lifetime care for senior cats whose owners can no longer care for them.

Our Vision

is to become the leading cat retirement sanctuary promising total peace of mind to cat owners and homelike, personalized care to the cats entrusted to us.

Our Values

Caring, Compassion, Empathy, Leadership



Cat Care

Goals

- Assemble a panel of Cat Care experts by 2016 to recommend appropriate standards, policies, practices and protocols necessary to achieve our vision to become the leading cat retirement sanctuary.
- Join the American Association of Feline Practitioners by 2016.

Strategies

- Conduct complete quality of life review every year from Cat, Cat owner, staff and volunteer perspectives to determine what can be done to optimize the well being of all current and future resident Cats.
- Reassess all Cat health and disease prevention and management practices, procedures and resources annually and optimize as necessary.
- Reassess quality of veterinary care and other Cat care-related resources each year and improve as necessary.
- Reassess all nutritional and grooming practices, procedures and resources annually and make improvements as needed.
- Reassess Cat safety, security and disaster mitigation, evacuation and recovery plans each year.
- Explore alliance with private non-profit animal welfare organization that specializes in adoptions to provide that service to Blue Bell.



Community & Public Relations

Goals

- Form strategic alliance with Laguna Beach Community Foundation by 2015.
- Become consistent presence in the local news media by 2015.
- Participate in the Laguna Beach Patriot's Day Parade by 2016.
- Establish annual "State of Blue Bell" letter to key stakeholders by 2016.
- Forge stronger relationship with civic leaders and Laguna residents by 2017.
- Achieve 20% "Community Cat" Lifetime Care residents by 2018.

Strategies

- Reconnect and re-engage with all key Laguna Beach stakeholders.
- As capacity and funding allows, continue to accept un-adoptable senior-age Cats for Lifetime Care Program from Laguna Beach Animal Shelter and qualifying hardship cases in Laguna Beach and Laguna Woods.
- Develop and offer seminars to help increase awareness of the need for estate planning for pets and how to best care for senior-age Cats.
- Forge collaborative working relationships with local businesses and organizations.
- Actively participate in Laguna Beach Chamber of Commerce, Business Club and partner with other Laguna non-profits where mutually beneficial.
- Offer "life enhancing" volunteer opportunities for local residents.



Facilities, Grounds & Gardens

Goals

- Add patio to Bertha Yergat Cottage to create community-gathering place for Blue Bell meetings, briefings, seminars and tours by 2015.
- Completely renovate the cottage to optimize Cat health and ensure the ultimate in energy and water conservation, environmental sensitivity and operational efficiencies by 2016.
- Install a state of the art, internet-based security system by 2016.
- Renovate overall landscape; install new “water conscious” irrigation system and “eco-friendly” gardens by 2017.
- Renovate entrance drive, parking area, pathways and utility areas by 2017.

Strategies

- Develop master renovation, landscape and maintenance plans that support our Mission and Vision and serve as the blueprint for all current and future property improvement, maintenance and optimization initiatives.
- Partner with the Laguna Beach Beautification Council, Laguna Beach Garden Club and Laguna Nursery to create “Blue Bell Gardens” and offer flora & fauna educational tours for local children.



Business & Management Practices

Goals

- Initiate statistical tracking program of pertinent data by 2016.
- Review and update Lifetime Care Program placement application by 2016.
- Explore LBCF investment management option by 2016.
- Receive highest Guidestar designation by 2018.
- Increase endowment to \$4,000,000 by 2025.

Strategies

- Achieve balanced budget every year.
- Remain debt free.
- Raise and maintain fee for Lifetime Care Program to true cost of care.
- Every Cat admitted will be fully funded either through estate plans or underwritten by our Community Cat Fund.
- The Blue Bell Board will conduct a bi-annual cost effectiveness, legal, investment performance, and risk management review to ensure we are optimizing and sufficiently protecting all of our assets as well as maintaining necessary financial controls and levels of insurance.
- Utilize collection and analysis of pertinent statistics to make the most prudent financial and management decisions.



Fund Raising

Goals

- Apply to IRS to convert from Private Foundation to Public Charity by 2015.
- Raise \$50,000 for the Community Cat Fund by 2016.
- Raise \$50,000 to beautify our grounds and gardens by 2016.
- Raise \$150,000 to renovate our cottage by 2017.
- Receive final IRS reclassification to Public Charity by 2020.
- Raise \$3,000,000 in new endowment reserves by 2025.

Strategies

- Develop and implement the “Campaign for Blue Bell,” which will achieve all short and long-term fund raising goals by 2025.
- Make every fund raising effort part of overall plan with specific goals.
- Evaluate effectiveness of all fund raising efforts on an annual basis.
- Collaborate with LBCF to obtain grants and planned giving contributions by connecting with major donors whose personal interests align with ours.
- Develop and implement planned giving program and appeal.
- Employ campus and endowment naming opportunities.
- Recognize major donors in unique ways throughout the houses, patios, grounds and gardens.
- Establish and implement formal grant request program and raise at least \$15,000 per year from these private funding sources.



Governance

Goals

- Create Advisory Board by 2015.
- Determine optimal size, qualifications, roles and responsibilities of Board of Directors by 2015.
- Develop succession and contingency plans for existing Board of Directors and recruitment plan for new Directors by 2016.
- Review Foundation Bylaws and revise as necessary by 2016.
- Expand Board of Directors to six members by 2016.

Strategies

- Task Advisory Board with primary responsibility for developing, implementing and optimizing Blue Bell's Strategic Plan.
- Continuously identify, cultivate and recruit new members for the Board of Directors and Advisory Board.
- Undertake thorough governance needs assessment and develop plan of action to implement approved recommendations.



Marketing & Communications

Goals

- Achieve absolute clarity about what Blue Bell does and how it serves the needs of Cat owners and the local community by 2015.
- Make the Lifetime Care Program Blue Bell's primary service offering by 2015.
- Project an image of caring, compassion, empathy and leadership by 2016.
- Modernize our graphic image/branding and apply uniformly and consistently throughout all media by 2016.

Strategies

- Clearly define our primary and secondary audiences, desired image and communication goals and develop comprehensive marketing and communications plan as a blueprint for achieving our goals.
- Develop and implement a local media relations/public relations program to raise and maintain Blue Bell's profile among our key target audiences.
- Conduct Marketing & Communications effectiveness and branding review every two years.
- Develop Blue Bell merchandise line and on-line store to help increase brand awareness and raise money for Community Cat Fund.



Organization & Operations

Goals

- Develop the optimal volunteer program to achieve Blue Bell's objectives, and faithfully carry out its Mission by 2017.
- Achieve optimal organization structure and staffing necessary to become the leading Cat retirement sanctuary by 2018.
- Optimize operational systems, processes, policies and procedures by 2019.

Strategies

- Reassess staffing needs, titles, roles and responsibilities, and required skills, expertise and experience to provide an "industry best" quality of life and care for our current and future resident Cats.
- Develop succession and contingency plans for key staff positions by 2016.
- Conduct complete assessment of operational effectiveness including all systems, processes, policies, procedures and protocols.
- Reassess current volunteer program and determine what changes are required to meet the needs of our Cats and our organization in the most efficient and effective manner.
- Initiate Volunteer recognition program including the Blue Bell Cat Awards, which will honor extraordinary accomplishments by individual volunteers.