

## Warriors and Quiet Waters Foundation

### Strategic Plan 2020-2022

December 20, 2019

#### Vision

We envision an America in which a new generation of combat veterans successfully reintegrates into society.

#### Mission

Through the experience of fly fishing in Montana, WQW is a catalyst for positive change in the lives of post-9/11 combat veterans and their loved ones.

#### Values

- Connection – *connecting warriors to people, places, nature, fly fishing*
- Nature – *belief in its restorative powers; we respect, protect, and use it properly*
- Service – *respect and honor military service and volunteer service*
- Integrity – *do the right thing, even when it's hard or no one is watching*
- Diligence – *relentlessly pursue the gold standard*

#### 3-year Strategic Vision

Over the next three years, WQW will effectively use its resources to provide a more complete scope of support for post-9/11 combat veterans, their spouses, caregivers, and family members.

#### Strategic Objectives and Key Results

**1) Program Objectives:** In three years, we will have meaningful and measurable programs developed that meet the needs of today's post-9/11 combat veterans and align with our desired outcomes. We will have traditional (core FXs) and expanded programs with new partners that focus on quality over quantity and follow-on services for warrior alumni and their family members.

a) Key Results:

- i) Increase percentage of returning alumni for both fishing experiences (Ice, Overnight River FX, Coaching, Partnerships, Couples) as well as volunteering. Measurable by number of returning participants divided by total participants for that season. Positive change comes through increased involvement and long-term relationships built with the organization and other warriors.
- ii) Short-Term Outcomes: Warriors are identified, vetted and attend an initial FX.
- iii) Mid-Term Outcomes: Warriors return to participate in second or third experience such as IceFX, Coaching FX, Overnight River FX or other identified experience with WQW partners.
- iv) Long-Term Outcomes: Warriors, Spouses, Family Members or Caregivers return to WQW to participate as a volunteer more than once. Success would be categorized as those that return at least once over a two-year period.

b) Longevity Statement: *Through the participation in WQW events, from Solo FXs to volunteering, warriors and their family members progress through a path of enrichment by returning to WQW to fan the flames of the next “generation” of transitioning warriors and their loved ones.*

- i) WQW will include Alumni Warrior Support programs.
- ii) Coaching FXs and other like-minded programs will continue and potentially expand.
- iii) Partnerships with organizations such as the Travis Manion Foundation will continue, ensuring we are serving not only the warriors, but also Gold Star family members who have lost their warrior loved ones.
- iv) Funding will keep pace with program expansion.

c) **Main Programs.** WQW will continue to develop and strengthen our programs in five areas. The objective is to provide an initial experience to recruit warriors, spouses and caregivers, then use this experience to further deepen our relationships either through follow-on FXs, Transition Experiences, Volunteer Opportunities and/or referrals to partners.

- i) Mission Experiences, which capture our baseline FXs (Solo) as well as the IceFX and Overnight River FX.
- ii) Enhanced Mission Experiences provide support to the warrior’s loved ones (couples, caregiver, and families) as well as Gold Star family members.
- iii) Transition Mission Experiences provide life coaching and transition assistance through partnerships, extending the longevity of our warriors’ participation with WQW.
- iv) Alumni Warrior Support provides an additional avenue of participation for alumni to mentor and inspire fellow veterans, spouses and caregivers.
- v) Alumni Referral Network provides an additional resource for alumni to seek assistance not offered by WQW, either through a direct referral or through vetted partnerships.

(1) **Mission Experiences** –Provides entry into the WQW longevity pipeline. Both male and female combat veterans will be selected. The first stop on the therapeutic road to recovery where WQW internal objectives are to gain and maintain the trust of warriors, ensure their safety and provide them a week of self-care, learn a new skill, and use the therapeutic effects of fly fishing to help them form a baseline to achieve their next goals.

(a) Metrics:

- (i) Short-Term: Program Effectiveness Surveys and Narrative Research to show a steady increase in effectiveness of the Mission Experiences. Statistically significant positive changes will be how success is measured for this metric.
- (ii) Mid-Term (Spans across programs) – Solo warrior attends Solo FX, then complete one of several secondary FX/events (Ice, SRX, CFX, etc.). Statistically significant positive changes will be how

success is measured for this metric, using Program Effectiveness Surveys or Narrative Research from before a Solo FX, and after secondary event.

- (iii) Long-Term: Percent of participants that return as Alumni Volunteers. Success is measured as continued engagement with WQW by Alumni.

(2) **Enhanced Mission Experiences (Couple/Caregiver/Gold Star Families)** – Provides support to the warrior’s loved ones (spouse, caregiver, Gold Star family members). The Caregiver FX is specifically for primary caregivers of post-9/11 combat veterans. Similar format as a Solo FX but with additional opportunities for compassionate self-care built in. A Couple’s Fishing Experience (FX) brings six couples together to share their common experience for six days. Couples events recognize the unique challenges of post-combat relationships. The Gold Star program, in partnership with the Travis Manion Foundation, serves Gold Star family members during one of their expeditions to Montana. A community or conservation engagement is paired with a fly fishing experience.

(a) Metrics:

- (i) Short-Term: Program Effectiveness Surveys and Narrative Research to show a steady increase in effectiveness of the Mission Experiences. Statistically significant positive changes will be how success is measured for this metric.
- (ii) Mid-Term: Reference Mission Experience Metrics
- (iii) Long-Term: Reference Mission Experience Metrics

(3) **Transition Mission Experience** – Provides professional coaching and transition assistance through partnerships to facilitate personal development and growth. The Coaching FX pairs warrior alumni with their own certified, professional coach whose primary role is to support alumni in accomplishing a significant personal or professional goal over 12 months’ time. Transition Mentoring Workshops harness the power of professional networks and relationships. In a partnership with the COMMIT Foundation (or similar organizations) we will facilitate synergy between top tier servicemembers and veterans and seasoned professionals from industries in which they will thrive, thus assisting with their transition out of the military into the civilian workplace.

(a) Metrics:

- (i) Mid-Term: Complete requirements at predetermined milestones during the period of each program.
- (ii) Long-Term: Continued personal development and growth for participants, measured at the two-year post-event date.

(4) **Alumni Warrior Support** – Provides opportunities for alumni warriors to return as volunteers. Alumni warriors are able to uniquely assist their fellow veterans in developing a sense of belonging, brotherhood, trust and a positive outlook. At the same time, the alumni are furthering their own journey of recovery by gaining a greater sense of purpose post-military life.

(a) Metrics:

- (i) Short-Term: Warrior attends Solo FX, then return as a volunteer. Statistically significant positive changes will be how success is measured for this metric, using Program Effectiveness Surveys or Narrative Research from before a Solo FX, and after volunteer event(s).
- (ii) Mid-Term: Percentage of participants that return as Alumni Warrior Support (percentage of total number of solo warriors that volunteer)

(5) **Alumni Referral Network.** Continue to develop our resource referral network for alumni. Continue to explore and vet complimentary programs to whom we can refer our alumni (verified partner network). Develop criteria to select these programs and number we need.

(a) Metric:

- (i) Long-term: 100% of Alumni participants who ask, receive support or a referral by WQW.

**2) Volunteer Objectives:** In three years, we will have recruited and trained 100% of the required high caliber, committed volunteers to support program needs. During 2020, a new emphasis will be placed on recruiting volunteers in areas of historical high donor concentration (Milwaukee, Phoenix). Current (2019) percentage of out of town volunteers stands at 40%. To ensure WQW is providing the best accommodations to our out of town volunteers, construction of the new “Red Barn” should be initiated as soon as funds are received. WQW objective is to have the new facility in place no later than the start of the 2021 season to provide top tier accommodations for our many volunteers.

a) Key Results:

- i) 100% of required volunteers recruited and trained.
- ii) Anticipated number of volunteers 2020-2022:

Season	2020	2021	2022
# Events	20	21	22
Volunteers Required	234	242	247

**3) Staffing Objectives:** In three years, we will have sufficient staff and office space to implement our operational plan in an efficient and effective manner. Staff will have reasonable workloads, competitive salary and benefits and will be evaluated on specific

performance measures. Current staffing is equipped to implement 19 high-quality and impactful events along with the infrastructure and budgets that support those events. The addition of a part-time administrative assistant in 2020 will free up marketing and event resources, which will help both in fundraising and recruiting (both warriors and volunteers). The contracting of an on-call Grant Writer will allow development to maintain focus on both small- and large-scale donations from private donors and corporations, while also aggressively seeking grants.

- a) Key Results to achieve these objectives include:
  - i) Onboarding new Executive Director
  - ii) Hire 0.5 FTE Admin Assistant
  - iii) Contract Grant Writer
  - iv) Controller to 1.0 FTE in 2022, if required.

<b>Season</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
Staff (FTE)	10.0	10.0	10.25
Staff #	11	11	11

**4) Asset Management Objectives:** Establish policies to identify, accept/acquire and manage WQW assets.

- a) Key Results to achieve these objectives include:
  - i) Finance and Budget Committee will establish an Endowment Reinvestment Policy.
  - ii) Finance and Budget Committee will establish a policy for real property management, to include a Capital Reserve Study. Real estate, vehicles, and donated assets will be addressed in this plan.
  - iii) Define short-, mid- and long-term goals for all Endowments.

**5) Finance Objectives:** Maintain strong internal controls, utilize full potential of current and long-term assets, manage and grow endowments, and match fundraising goals to desired operational outcomes.

- a) Key Results to achieve these objectives include:
  - i) F & BC committee should monitor financial reports and ledgers on a regular basis for inconsistencies, budget performance, or any control deviations.
  - ii) Identify fixed asset operational capacities to determine if over or under utilizations are present.
  - iii) Ensure that the Endowments are invested in accordance with state and federal laws. Endowments are invested funds that require monitoring and market planning for long term and short-term goals. Goals for each endowment's balance should be reviewed annually and match long term goals. Identify annual endowment expenditures that will be matched with funds purpose.
  - iv) Operational goals should not exceed the expectations of the development teams unrestricted fundraising goals for the year.

- v) Develop plan to ensure the returns on endowments to be a significant contributor to operational requirements of the programs, to include annually metrics for each year. Plan to be complete NLT March 28, 2020.

**6) Marketing Objectives:** Develop and execute marketing and development strategies and tactics that enhance awareness, donations and loyalty. Develop and execute revised positioning that further differentiates WQW from other like Veteran Service Organizations (VSO).

- a) Key Results to achieve these objectives include:
  - i) Establish a Marketing plan that addresses our two major target audiences - participants and donors. Plan will include segmentation and marketing calendar.
  - ii) Develop Strategic Communication Plan using marketing objectives
  - iii) Complete website redesign, to include ability to sell products as well as have a secure page for Board of Director's documents and files.
  - iv) Develop marketing items that actively support development objectives
  - v) Merchandise items to increase awareness.

**7) Board Development and Recruitment Objectives:** In three years, WQW will have a diverse and engaged BOD focused on their governance and fiduciary responsibilities and building relationships to support outreach and fundraising efforts.

- a) Key Results to achieve these objectives include:
  - i) Strive for a skills-based board
  - ii) Thorough ED and Officer succession plans will be developed
  - iii) Provide ongoing education opportunities for strong board governance and fiduciary oversight

**8) National Advisory Board (NAB) Objectives.** Review and update the roles, responsibilities and objectives of the NAB.

**9) Strategic Plan changes and updates.** The WQW Strategic Plan is a living document that can and should be updated over the course of the three-year period and may be reviewed annually. All changes will require the Board of Directors vote for final approval.

  
Chairman, WQW Board of Directors


Thomas P. Stiffler  
Printed Name

1.13.20  
Date

  
Secretary, WQW Board of Directors

POTNAM, GREG  
Printed Name

14 JAN 2019  
Date

  
WQW Interim Executive Director

Mike Powell  
Printed Name

1/13/20  
Date