

Association of Oregon Recyclers

STRATEGIC PLAN FOR 2018-2020

APPROVED JANUARY 18, 2018

Introduction

This Strategic Plan is intended to serve as a guide for board and contractor actions, decision-making and priorities for the calendar years 2018 through 2020.

An accompanying Work Plan will serve as a timeline for implementation of the strategic plan.

The strategic plan and work plan will be reviewed on an annual basis at the Board retreat to ensure accountability and to fine-tune the plan as needed.

The strategic plan is divided into two categories: organizational goals and institutional goals. Underneath goal are a set of bulleted strategies.

ORGANIZATIONAL GOALS

Organizational goals are externally focused and represent the broad aims AOR hopes to accomplish via its programmatic offerings.

Goal 1: Education - Offer forums for discussion, networking, and educational opportunities throughout the state regarding recycling and materials management in Oregon.

Goal 2: Business and Professional Development – Identify and provide statewide opportunities for members to engage with other industry professionals for the purpose of advancing careers, business, and recycling and materials management.

Goal 3: Strategic Partnerships– Convene, collaborate, and develop strategic partnerships to better promote AOR’s mission, support existing and new programs to advance recycling and materials management in Oregon, the northwest, and beyond.

Goal 4: Public Policy – Advocate for public policies that further AOR’s mission, with a primary focus on state policies.

Goal 5: Equity, Diversity, and Inclusion – Adapt AOR programs over time to increasingly fulfill the values of equity, diversity, and inclusions.

Goal 6: Reduce and Reuse – Increase AOR’s programmatic attention to “reduce” and “reuse” as important tools in the quest for sustainable materials management

GOAL 1: Education

Offer forums for discussion, networking, and educational opportunities throughout the state regarding recycling and materials management in Oregon.

Strategies for Achieving Goal:

- A. Provide online educational communications/learning opportunities to members and supporters regarding recycling, reuse, composting, and related topics.
- B. Continue to promote, maintain, and when appropriate update Recycling 101, making recycling education available throughout the state via online learning.
- C. Host annual conference that provides high-level, engaging content relevant to all sectors of the recycling industry.
- D. Host (2) tours of recycling, reuse, composting, or other related businesses per year.
- E. Host (2) forums per year regarding current recycling, reuse, composting, or related topics, that provides for and represents all sectors of the industry.
- F. Experiment with the use of online technologies to share real-time access to the Conference and Forums from those unable to participate in person.

Goal 2: Business and Professional Development

Identify and provide statewide opportunities for members to engage with other industry professionals for the purpose of advancing careers, business and recycling and materials management.

Strategies for Achieving Goal:

- A. Provide networking opportunities at all AOR sponsored events.
- B. Host annual Sponsor Appreciation Night for recognizing organizational and conference sponsors.
- C. Launch a Job Fair and make it an annual activity if it's evaluated favorably.
- D. Evaluate and improve the website with a focus on business/professional development, including improvements to the online member directory.
- E. Strengthen the Regional Liaisons program by:
 - Providing Regional Liaisons a small budget to be used for AOR events/activities. *(While these events/activities should also generate revenue, AOR will relax its rule requiring events to plan for at least breaking even as it seeks to build its brand and membership in areas beyond the I-5 Corridor).*
 - Providing Regional Liaisons an annual opportunity to meet and learn from each other at the Conference or via an alternative mechanism.

Goal 3: Strategic Partnerships

Convene, collaborate, and develop strategic partnerships to better promote AOR's mission, support existing and new programs to advance recycling and materials management in Oregon, the northwest, and beyond.

Strategies for Achieving Goal:

- A. Participate in and represent AOR in various local, regional, statewide, and national workgroups and/or coalitions related to recycling and materials management.
- B. Develop strategic partnerships with a prioritized list of organizations with whom collaboration holds the potential to promote AOR's mission or advance more specific Goals. Annually update the list of prioritized partner organizations and who within AOR should lead in relationship-building with each of them.
- C. Develop public relations and marketing strategies that further AOR and brand recognition for the organization and its partners.

Goal 4: Public Policy

Advocate for public policies that further AOR's mission, with a primary focus on state policies.

Strategies for Achieving Goal:

- A. Launch a rebooted Legislative Committee that will support and advance sustainable materials management in Oregon.
 - o The rebooted Legislative Committee should maintain representative from all significant sectors within the membership.
 - o The rebooted Legislative Committee should include representation from both urban and rural Oregon or, in the absence of rural representation, should build into its processes an alternative mechanism to ensure input is received from both urban and rural members regarding major policy issues.
- B. Under the Legislative Committee's leadership, serve as a leader, convener, and initiator of policy initiatives by:
 - o Developing policy positions, statements, and fact sheets with the purpose of outlining the organization's position (aligned with the organization's vision, mission and goals), as well as providing clear guidance for members and the general public on policy and legislative issues;
 - o Being recognized as "the" resource for recycling and materials management information in Oregon by presenting factual information to lawmakers when they are faced with issues that affect materials management in Oregon.
 - o Working with a contract lobbyist to support/advance AOR's policy positions at the state level.
 - o Participating in policy workgroups;
 - o Exploring opportunities with sister organizations to advance policy at a multi-state level;

Note: During the first half of 2018, the rebooted Legislative Committee should look at the bulleted list underneath Strategy B (above) and make recommendations to the Board for any changes to it, for consideration at the Summer 2018 Board Retreat.

- C. Utilize membership in the National Recycling Coalition to assess opportunities to improve policies at the national or regional levels in ways that directly impact sustainable materials management in Oregon.

Goal 5: Equity, Diversity, and Inclusion

Adapt AOR programs over time to increasingly reflect the values of equity, diversity, and inclusions.

Strategies for Achieving Goal:

- A. Develop and utilize an Equity, Diversity, and Inclusion Committee with board and non-board membership with the intent of using the Committee to inform future planning under Goals 1 through 4 to ensure the work done increasingly reflects the intent of this EDI Goal.
- B. Develop a toolkit for member organizations to use to improve their hiring practices when it comes to diversity and inclusion.
- C. Ensure partnerships under Goal 3 include at least some organizations whose primary mission includes providing opportunities for people of color.

Goal 6: Reduce and Reuse

Increase AOR's attention to "reduce" and "reuse" as keys actions towards sustainable materials management.

Strategies for Achieving Goal:

- A. Include specific references to reduce and reuse as strategies to be pursued in communications responding to market conditions and contamination of the recyclable materials.
- B. Strengthen relationships with existing members with a reduce/reuse focus and develop a specific proactive strategy for adding new ones.
- C. Charge the rebooted Legislative Committee with exploring ways in which a Legislative agenda can advance reduce/reuse strategies.

INSTITUTIONAL GOALS

Institutional goals are internally focused and represent the broad aims AOR hopes to accomplish that increase its capacity to do programmatic work.

Goal 1: Membership – Increase membership and membership engagement across all sectors of the industry in order to strengthen the organization.

Goal 2: Revenue – Increase and diversify revenue streams to ensure long-term fiscal health and sustainability of the organization.

Goal 3: Leadership – Improve board leadership and cultivate future organization leaders.

Goal 4: Staffing and Administration – Improve efficiency and management of organization.

Goal 5: Potential Charitable Arm – Either spin off to be independent or shut down the Oregon Recycling Markets Development Corporations, while separately evaluating and potentially launching a tax-deductible charity aligned with AOR's mission.

Goal 1: Membership

Increase membership and membership engagement across all sectors of the industry in order to strengthen the organization.

Strategies for Achieving Goal:

- A. Increase the percentage of non-members attending events who choose to become members.
- B. Diversify membership by targeting new members, with focus on businesses involved in recycling, waste prevention and materials management, geographic areas of the state where the membership is lagging, and members who represent constituencies and activities that help advance AOR's Organizational Goal 5 (Equity, Diversity, and Inclusion).
- C. Work with Regional Liaisons to ensure work they do under Goal 2 Strategy E is done in way that engages potential members and encourages them to become members.
- D. Develop and promote membership benefits and identify ways to further support and promote member activities and successes.
- E. Ensure AOR presents a welcoming and inclusive environment so that new members from diverse constituencies are more likely to become engaged in the work and retain their membership.

Goal 2: Revenue

Increase and diversify revenue streams to ensure long-term fiscal health and sustainability of the organization

Strategies for Achieving Goal:

- A. Adopt balanced operating budget each year.
- B. Develop an annual fundraising plan with realistic fundraising goals based on historical performance of events and other revenue generating activities conducted by the organization.
- C. Explore grant opportunities to support new and existing programs, either by partnering with other organizations able to receive charitable grants or by launching a 501c3 arm (see Institutional Goal 5, below).
- D. Explore partnership opportunities with other organizations that provide in-kind donations as a way to reduce AOR costs for planned activities.
- E. Host events, e.g. tours, forums and conference that generate net revenue.
- F. Increase attendance of both members and non-members at AOR events, especially the annual conference.

Goal 3: Leadership

Improve board leadership and cultivate future organization leaders.

Strategies for Achieving Goal:

- A. Ensure all board members have clear understanding of their role on the board by providing job descriptions and outlining roles and responsibilities for serving the organization.
- B. Develop a culture of accountability by generating a short list of commitments after each board meeting and reviewing what's happened in meeting those commitments at subsequent meetings.
- C. Ensure all board members are culturally competent and receive training on equity, diversity, and inclusion in 2018 and again in 2020.
- D. Add a new board position for the chair of the Equity, Diversity, and Inclusion Committee (see Goal 5 Strategy C).
- E. Consider moving towards using co-chairs for the Conference.

- F. Ensure current board members are actively seeking to identify future board members who are representative of the organization's membership, particularly by their strong involvement in committees or organizational ambassador program.
- G. Pay particular attention in board recruitment to identifying and securing board nominations from those who work/live outside the I-5 corridor and those whose addition will help the board reflect the state's diversity.

Goal 4: Staffing and Administration

Improve efficiency and management of organization.

Strategies for Achieving Goal:

- A. Develop policies and procedures manual with clear guidelines for decision-making.
- B. Improve overall functionality of organization through technological improvements and/or by streamlining activities.
- C. Achieve consensus on the organization's long-term staffing model and implement the consensus choice.
- D. Review contract staff positions and job descriptions on annual basis, including evaluation options.

Goal 5 – Related Entities

Either spin off to be independent or shut down the Oregon Recycling Markets Development Corporations, while separately evaluating and potentially launching a tax-deductible charity aligned with AOR's mission.

Strategies for Achieving Goal:

- A. During the first half of 2018, complete research in order to determine what form a 501c3 arm would take, what current AOR activities could be undertaken by or funded by a 501c3, and what it would take to successfully launch it.
- B. During first half of 2018, engage with stakeholders to determine if sufficient interest exists to reboot ORMDC as a wholly separate independent nonprofit capable of fulfilling its mission of advancing market development for recycled materials in Oregon (and the northwest).
- C. Make a yes/no decision on launching a new 501c3 during summer 2018.
- D. Make a spin-off/shut-down decision on the future of ORMDC during summer 2018 and take necessary legal steps based on the decision made.
- E. If a "yes" decision is made on a new 501c3, take steps during fall 2018 to launch the 501c3 and make additional updates to this strategic plan if some strategies within it will be "spun off" to be undertaken by the new entity.

Appendix on Staffing Models

This Appendix serves as additional information regarding implementation of Institutional Goal 4, Strategy C.

The board can envision three future **scenarios** for staffing:

1. Status quo – continue to implement the status quo approach of using 3 primary contractors around the conference, the Legislature, and general management. Potentially add a fourth contractor to lead on communications, under the direction of the general management contractor.
2. Executive Director – move towards a more traditional model with a full-time Executive Director who uses/manages other part-time staff and/or contractors to meet particular needs.
3. Contractor reorganization – Move away from the current model of having a general management contractor and a conference-specific contractor and replace them with a senior contractor and a junior/assistant contractor who together accomplish what the current general management and conference contractors do.

To choose among these, the board needs further **research and analysis**, specifically:

- A more detailed outline of scenarios 2 and 3 and what major tasks would be done by whom under those scenarios, including any shifts from the status quo in terms of board responsibilities.
- A more detailed comparison of what a budget would look like under either Scenarios 2 or 3. With Scenario 2, this budget should take into account the potential role of the Executive Director in securing new revenue.
- A better understanding of how the current general management contractor's time is divided up among various major tasks and the overall level of hours worked in comparison to hours stipulated in the contract.
- More research on appropriate contract fees for lobbying under a scenario where AOR does not have a proactive agenda versus one where it does.
- After the next conference, doing a de-brief that identifies the major tasks that went into it and who did what.

To accomplish this research and analysis, the **board chair** will work over the course of **2018** to:

- Identify 2-3 board members and/or others who can assist in leading the research/analysis called for above.
- Take into account any decision made in summer 2018 regarding the potential establishment of a 501c3 arm.

- No later than October 2018, generate a draft of a document or documents in response to the research/analysis needs identified above.