



# ST. LOUIS AQUARIUM FOUNDATION

STRATEGIC PLAN

1/29/2019

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# LETTER FROM THE CHAIRMAN AND FOUNDER

## *Welcome to The St. Louis Aquarium Foundation*

At the heart of St. Louis, two great rivers converge. From its earliest origins, water has played an essential role in the landscape, development and prosperity of the St. Louis region. Water is the most vital resource on our planet, and the soon-to-open St. Louis Aquarium is a place where people will learn about and celebrate our region's deep appreciation for the water that surrounds and sustains us while adding to the vibrancy of the burgeoning downtown revitalization.

The St. Louis Aquarium Foundation is the nonprofit partner to the St. Louis Aquarium at Union Station. It exists to help engage all members of the community by providing access and education programs and serving as the region's recognized voice for water stewardship.

The Aquarium Foundation formed in November 2017 and was announced at the groundbreaking ceremony for the St. Louis Aquarium at Union Station. With the investments of the Aquarium and other attractions coming to Union Station in late 2019, the Foundation board desires to help ensure that this extraordinary educational and inspirational experience is accessible for all. We believe the Aquarium experience will motivate people to take action to preserve and protect the local water resources that surround and shape our daily lives.

The Foundation's Executive Director Diane Bauhof joined the team in March 2018. She works in partnership with the St. Louis Aquarium leadership to reach into the community through both 1) engaging donors and partners; and 2) providing important science-based educational programs to schools and children. The Board of Directors is comprised of respected community leaders and individuals committed to a thriving greater St. Louis region.

While access and education are at the core of the Aquarium Foundation's mission, we needed a clear roadmap for making a positive impact on the community. The Foundation spent six months researching, planning, listening, engaging educators and other community stakeholders to help inform our priorities and goals in a three-year strategic plan. The plan will guide our work through 2021 as the Foundation becomes more active in the St. Louis region, in the conservation community, as a partner to the Aquarium, and as a resource to educators and researchers.

On behalf of the Board of Directors and staff of the St. Louis Aquarium Foundation, we invite you to join us in this exciting effort. The ambitious goals detailed in this plan are crucial to building capacity to help our community, developing and strengthening community partnerships, and laying the groundwork for a thriving St. Louis Aquarium Foundation and St. Louis region that relies on water for life.

Sincerely,



Steve O'Loughlin  
*Chairman of the Board*  
St. Louis Aquarium Foundation



Robert O'Loughlin  
*Founding Board Member*  
St. Louis Aquarium Foundation

# EXECUTIVE SUMMARY

Water is a part of the fabric of St. Louis, part of what makes it the prosperous, vibrant city that it is. A place where the confluence of mighty rivers first brought explorers, hopeful for the great possibility, opportunity and dreams it provided. Since that moment of discovery, water has offered inspiration and innovation to all in the great city of St. Louis. Water sustains all life on earth and, in St. Louis, being stewards of the vital source is a point of pride.

In the heart of a revitalized downtown St. Louis, within historic Union Station: a symbol of innovation and possibility in the Gateway city, is the St. Louis Aquarium. A place steeped with so much rich history creates the perfect setting to write the stories of the future. A future that builds upon the great visions of the original founders and architects. The St. Louis Aquarium, a place where the next generation of water stewardship begins. A true gem in St. Louis, a city and region on the move globally, the Saint Louis Aquarium Foundation provides opportunities to teach, inspire and motivate people to action to protect one of our most precious resources, both within and beyond the walls of the St. Louis Aquarium.

In concert with the St. Louis Aquarium team, the St. Louis Aquarium Foundation embarked on an extensive strategic planning process that informed and shaped this strategic plan.

The six-month process included a research and discovery phase during which the St. Louis Aquarium Foundation sought input, opinions and ideas from a wide variety of local and regional stakeholders of all backgrounds and ages who have an interest in education, conservation and revitalization in St. Louis, an invitation for engagement that will broaden and continue. This information helped to identify strategic issues the St. Louis Aquarium Foundation needed to address by gaining a deeper understanding of community wants, needs and perceptions



of key leaders in the St. Louis Area. The internal analysis and public engagement through interviews and surveys helped inform development of a strategic plan that includes establishing the organization's mission and key priorities, goals and strategies for the next three years.

Tools used to gather stakeholder input included:

- Nearly a dozen individual interviews
- Online public survey garnering nearly 1,500 responses

The listening process with educators, community leaders and the public informed the St. Louis Aquarium Foundation and guided a subsequent series of planning and strategy meetings. The result is a roadmap to the St. Louis Aquarium's opening in 2019 and for what's on the horizon over the next three years from 2019–2021.

After the listening and discovery work was complete, leadership began a deep exploration of aspirations for the future resulting in creation of a bold vision statement:

**Transformed by their Aquarium experiences, people will act to make positive changes that protect water that sustains all living things.**

And a mission to guide the work ahead:

**As the non-profit partner of the St. Louis Aquarium, we engage the community through access and education programs, serving as the region's recognized voice for water stewardship.**

Key focus areas of the Foundation's strategic plan are:

- Awareness of the Foundation and Fundraising
- Water Stewardship
- Education
- Access
- Operational Excellence

Supporting each of these areas are goals that will guide the Foundation's work the next three years and beyond, including:

### *Awareness of the Foundation and Fundraising*

- Create an awareness building plan for the Foundation
- Develop a fundraising plan highlighting capital and operating needs
- Create a coordinated plan for the launch of the Foundation in coordination with Aquarium & LHM

### *Water Stewardship*

- Establish the Foundation and Aquarium as the recognized voice for water stewardship in the community
- Engage the community in water issues

## *Education*

- Create a comprehensive onsite education program that provides aquatic life and water stewardship learning opportunities to school children in specific grades who visit the Aquarium
- Engage the public through the volunteer program
- Research, evaluate and assess opportunities for creation of additional teacher, school, outreach and youth programs

## *Access*

- Create access program for Title I schools and other underserved audiences
- In partnership with the Aquarium, create a plan to enhance commitment to physical access for special needs audiences

## *Operational Excellence*

- Build a staffing plan and model for the Foundation
- Build a board development plan including expanding the board to represent community
- Create a 3-year operating budget and projected fundraising goals
- Maintain strong and ongoing communication and coordination between Aquarium and Foundation leadership staff



These priorities and goals along with a deeply committed St. Louis Aquarium Foundation Board of Directors, staff and in partnership with residents, schools, businesses, foundations and community leaders will create and support revenue generation that will help deliver one-of-a-kind educational programs, access to the Aquarium and a platform for thought leadership on protecting water and aquatic life. The Aquarium will become a place to learn and interact with water and be a recognized place for water stewardship.

And, although the planning cycle has now ended, the intentionality of the work begins with renewed vigor and focus in 2019 and the years ahead.

Please join us on our journey to bring the water stewardship message and an experience that is amazing for all in St. Louis, as we work collaboratively to open the Aquarium, provide access to students and inspire our community to protect a precious resource.

## VISION

Transformed by their Aquarium experiences, people will act to make positive changes that protect water that sustains all living things.

## MISSION

As the non-profit partner of the St. Louis Aquarium, we engage the community through access and education programs, serving as the region's recognized voice for water stewardship.

## STRATEGIC PRIORITIES

- Awareness of the Foundation and Fundraising
- Water Stewardship
- Education
- Access
- Operational Excellence (Board, Staff, Infrastructure Development)



PRIORITY #1:

**AWARENESS OF THE  
FOUNDATION AND  
FUNDRAISING**

# GOAL 1

## *Create an awareness building plan for the Foundation*

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### **OBJECTIVE**

By Q1 2019, finalize and approve the plan.

**STRATEGY** By June 2019, create a contributed revenue strategy which identifies infrastructure needs and resources

**STRATEGY** Create audience-specific materials for key audiences: Media, teachers, conservation organizations, volunteers, potential donors

**STRATEGY** Develop a marketing and media strategy to keep the public informed about the Foundation and interested in supporting it

# GOAL 2

## *Develop a fundraising plan highlighting capital and operating needs*

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### **OBJECTIVE**

By Q1 2019, develop a fundraising plan.

**STRATEGY** Identify capital needs, programming needs and funding opportunities

**STRATEGY** Define Board of Directors engagement and responsibilities to assist in donor outreach, cultivation and solicitation

**STRATEGY** Create events to support friend & fundraising

**STRATEGY** Develop donor database

## GOAL 3

***Create a coordinated plan for the launch of the Foundation in coordination with Aquarium & LHM***

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### **OBJECTIVE**

By end of Q3 2019, determine events for Foundation as part of the pre-opening and 125th anniversary of Union Station festivities.

**STRATEGY** Engage key stakeholders through fundraisers, community engagement opportunities, volunteer recruitment opportunities and teacher engagement activities





PRIORITY #2:

# **WATER STEWARDSHIP**



# GOAL 1

***Establish the Foundation and Aquarium as the recognized voice for water stewardship in our community***

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## OBJECTIVE

By end of Q4 2021, media and collaborating partners will recognize and call upon the Foundation as an expert resource for water stewardship in the region.

**STRATEGY** Build water stewardship message into Aquarium experience

**STRATEGY** Build partnerships with regional universities, nonprofits and agencies

**STRATEGY** Incorporate water stewardship into education programs

**STRATEGY** Provide regional thought leadership in water stewardship

## GOAL 2

### *Engage the community in water issues*

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#### **OBJECTIVE**

By 2021, the Aquarium Foundation will be a valued resource for people in the community for issues relating to water stewardship.

**STRATEGY** Collaborate with local conservation organizations

**STRATEGY** Host and participate in community events, stream cleanups and other water conservation events to further the Aquarium and Foundation's water stewardship work

**STRATEGY** Be a resource and connector on water conservation issues regionally for water-focused conservation activities, recreation and volunteer opportunities

**STRATEGY** Choose key corporate partners who share water stewardship goals and collaborate to market water conservation messages throughout the St. Louis region



PRIORITY #3:

**EDUCATION**

# GOAL 1

***Create a comprehensive onsite education program that provides aquatic life and water stewardship learning opportunities to school children who visit the Aquarium (Self-guided and fee-based programs)***

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## OBJECTIVE

By Q2 2019, identify the education program's audience(s), goals and timeline. By January 2020, begin providing curriculum classes/programs at Aquarium.

**STRATEGY** Engage educators early to provide direction as plan is being developed

**STRATEGY** Create an Educator Advisory Council to advise the Foundation on its education program and curriculum development

**STRATEGY** Build scalable program model for all school visits including self-guided vs. fee-based programs

**STRATEGY** Launch test pilot programs for fee-based programs to provide for operational testing, learning and evaluation before full scale roll out

## GOAL 2

### *Engage the public through the volunteer program*

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#### **OBJECTIVE**

After program launch in 2020, increase volunteer participation by 10% each year beginning in 2021.

**STRATEGY** Create volunteer recruitment strategies, develop materials in concert with Aquarium

**STRATEGY** Work closely with Aquarium Operations to incorporate volunteers into Aquarium experience

**STRATEGY** Support the Conservation & Education Center with volunteer staffing

**STRATEGY** Engage youth in Foundation and Aquarium's experiences through developing a youth/teen volunteer program (2021)

## GOAL 3

### *Research, evaluate and assess opportunities for creation of additional teacher, school outreach and youth programs*

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#### **OBJECTIVE**

By 2021, complete evaluation and begin planning for selected programs.

**STRATEGY** Evaluate community needs for creation of internship and mentorship program

**STRATEGY** Evaluate need for a teacher professional development program





## PRIORITY #4:

# ACCESS



## GOAL 1

### *Create access program for Title I schools and other underserved audiences*

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#### **OBJECTIVE**

By Q1 2020, launch program and by year-end provide 25,000+ free admissions annually for Title I students and underserved audiences.

**STRATEGY** Build and approve a plan and budget to include transportation for qualifying underserved schools and other organizations

**STRATEGY** Engage and support schools and parent-teacher organizations in their fundraising efforts by providing Aquarium access to further raise awareness and build relationships

## GOAL 2

### *In partnership with the Aquarium, create a plan to enhance our commitment to physical access for special needs audiences*

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#### **OBJECTIVE**

Building on the Aquarium's operations and current guest experience, create a program in 2020 and implement in 2021.

**STRATEGY** Engage community partners serving special needs populations to understand what accommodations are desired to enhance inclusion opportunities (for example, audio recordings, deaf interpreters)



**PRIORITY #5:**

**OPERATIONAL EXCELLENCE:  
BOARD, STAFF AND INFRASTRUCTURE  
DEVELOPMENT**

# GOAL 1

## *Build a staffing plan and model for the Foundation*

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### **OBJECTIVE**

By Q2 2019, have a structure in place supported by the Board of Directors to prioritize personnel resources.

**STRATEGY** Hire approved personnel positions according to identified priorities and timeline in concert with LHM and Aquarium

**STRATEGY** By Q1 2019, develop a staffing plan for the Education Department—including consideration of shared resources between the Aquarium and Foundation

**STRATEGY** Build development/fundraising staffing and capabilities

**STRATEGY** Beginning in Q2 2019, hire approved Manager of Volunteer Services

**STRATEGY** Build infrastructure to support personnel and emerging culture in concert with LHM and Aquarium

# GOAL 2

## *Build a board development plan including expanding the board to represent community*

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### **OBJECTIVE**

By Q4 2019, have a Board of Directors development plan in place.

**STRATEGY** Cultivate and successfully recruit additional board members to meet identified needs on the board (Increase diversity of thought, background, experience)

## GOAL 3

### *Create a 3-year operating budget and projected fundraising goals*

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#### **OBJECTIVE**

By Q1 2019, have draft 2019-2021 budgets in place with Board input and approval.

#### **STRATEGY**

Develop a financial model based on projected fundraising and operating expenses that address the strategic plan goals through fiscal years 2019-2021

## GOAL 4

### *Maintain good and ongoing communication and coordination between Aquarium and Foundation leadership staff (Executive Director of Aquarium and Executive Director of Foundation)*

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#### **OBJECTIVE**

By Q2 2019, have a structure in place that helps Foundation and Aquarium leadership staff coordinate activities and responsibilities to ensure maximized efforts by both teams and avoids duplication of work.

#### **STRATEGY**

Establish regular communications between the ED of Aquarium and ED of Foundation to discuss activities, needs and opportunities for collaboration and shared resources

# TIMELINE

2019

Q1		
Jan	Feb	Mar
Finalize and approve the (awareness building) plan		
Develop a fundraising plan		
Have draft 2019-2021 budgets in place with Board input and approval		

Q2		
Apr	May	Jun
Identify the education program's audience(s), goals and timeline		
Have a structure in place supported by the Board of Directors to prioritize personnel resources		
Have a structure in place that helps Foundation and Aquarium leadership staff coordinate activities and responsibilities to ensure maximized efforts by both teams and avoids duplication of work		

Q3		
Jul	Aug	Sep
Determine events for Foundation as part of the pre-opening and 125th anniversary of Union Station festivities		

Q4		
Oct	Nov	Dec
Have a Board of Directors development plan in place		
Evaluate progress of strategic plan, make edits as necessary		

Ongoing					
Launch (volunteer) program					
Create a (special needs) program, building on the Aquarium's operations and current guest experience					
By year-end, provide 25,000+ free admissions annually for Title I students and underserved audiences					
Q1			Q2		
Jan	Feb	Mar	Apr	May	Jun
Launch (free access) program					
Begin providing curriculum classes/programs at Aquarium					
Q3			Q4		
Jul	Aug	Sep	Oct	Nov	Dec
			Evaluate progress of strategic plan, make edits as necessary		



## Ongoing

The Aquarium Foundation will be a valued resource for people in the community for issues relating to water stewardship

Increase volunteer program participation by 10% each year beginning in 2021

Complete evaluation and begin planning for selected (outreach/youth) programs

Implement (special needs) program, building on the Aquarium's operations and current guest experience

## Q1

Jan

Feb

Mar

## Q2

Apr

May

Jun

Begin next strategic plan

## Q3

Jul

Aug

Sep

## Q4

Oct

Nov

Dec

Media and collaborating partners will recognize and call upon the Foundation as an expert resource for water stewardship in the region (by end of Q4)

## **EXECUTIVE COMMITTEE**

Steve O'Loughlin, *Chair*

Robert O'Loughlin, *Treasurer*

Robert Guest, Jr., *Secretary*

## **BOARD OF DIRECTORS**

George Bauer

L.B. Eckelkamp, Jr.

James Lally

Peggy Ritter

Thom Sehnert

## **EXECUTIVE DIRECTOR**

Diane Bauhof, *CFRE*