Encompass Strategic & Business Plan 2020

Programs

Organizational Consulting 1
   Transformational DEI Consulting 1
   DEI Assessment 1
   DEI Institute 2
   Ad-hoc and Retainer Services 3

Research
   State of the Movement Report 4

Global Majority Advocate Services 5
   Global Majority Caucus 5
   Talent Database 6

Ad-hoc and Retainer Services 3

Operations

Organizational Structure and Staffing 6
   Human Resources 7

Governance

Board of Directors 7
   Advisory Council 7

Finance and Development

Revenue Generation 7
   Development 8
   Complete Encompass 2020 Budget 8
   Future Potential Growth Opportunities 9
   Exploring Other Client Areas 9
   Exploring Other Equity Areas 9
   Exploring Other Lines of Service 9
   Capabilities and Resources Gaps 9

Conclusion 9
Programs

Organizational Consulting

Transformational DEI Consulting

- **What**
  - 1-2 year, in-depth, culturally-transformational, racial DEI consulting engagement

- **Objectives**
  - Phase 1: For senior leadership to articulate why DEI is important to them personally and to the organization, and also identify where the organization has room for improvement
  - Phase 2: Create a racial DEI plan so everyone in the organization understands why DEI is needed to advance the cause of animal protection, their role in DEI work, and what accountability looks like to make this vision a reality
  - Phase 3: Begin to work on the highest priority issues identified in Phase Two. By the time we complete our work, organizations will have the tools they need to continuously and independently advance DEI

- **Target Audience**
  - Primary: Farmed animal protection organizations in the United States
  - Secondary: Funders
  - Secondary: Animal advocates of the global majority

- **Encompass Goal**
  - 2-3 new organizational engagements per year

- **Monitoring and Evaluation**
  - Participation records - to assess demand for transformational projects
  - Pre and post DEI concepts survey; client satisfaction survey - to assess Encompass’ performance
  - Phases reports - to gain insight into the challenges and dynamics organizations face, and how Encompass can help them grow
  - 1-year follow up survey - to assess long-term value to the organization; to gauge need for additional services
  - Encompass internal records (time, cost, etc.)

- **Budget** - Priced according to client’s budget based on latest 990, subsidized through philanthropy

DEI Assessment

- **What**
  - Short-term Global Diversity and Inclusion Benchmarks (GDIB)-aligned diagnostic assessment available for farmed animal protection organizations. Encompass will produce internal report explaining findings and issue an internal racial DEI score card based on benchmarks developed by the GDIB.

- **Objectives**
○ Provide the organization clarity on where it thrives and where extra attention is needed
○ Provide the organization clarity on metrics to benchmark for future success
○ Provide the organization clarity on the types of DEI work that are needed to advance and who needs to be involved

● Target Audience
○ Primary: Farmed animal protection organizations in the United States
○ Secondary: Funders, evaluators

● Encompass Goal
○ 2-3 client organizations per year
○ Because the Transformational DEI Consulting work is our priority, we are disincentivizing the Assessment through pricing. However, we recognize that we are able to offer value to organizations who do not know how they perform on DEI, and so are offering the Assessment as an entry point to prospective consulting client organizations.

● Monitoring and Evaluation
○ Participation records - to determine demand for the assessment
○ Client satisfaction survey - to assess Encompass’ performance
○ Assessment report - to gain insight into the challenges and dynamics organizations face, and how Encompass can help them grow
○ 1-year follow up survey - to assess long-term value to the organization; to gauge need for additional services
○ Encompass internal records (time, cost, etc.)

Pricing and Budget - Priced according to client’s budget based on latest 990, subsidized through philanthropy

**DEI Institute**

● What
○ 2-day beginners training March 16-17, 2020
○ Location: California Community Foundation’s Joan Pavlevsky Center, Los Angeles
○ For future consideration in 2021—similar training on the east coast, and/or Level 2 training

● Objectives
○ Create shared language and overall DEI work objectives
○ Explore the ways racism operates in our society and apply that knowledge to the farmed animal protection movement
○ Explore the impact of racism on advocates, and how that harms organizations and our movement
○ Discuss how we can create more equity and justice in farmed animal protection organizations and our movement

● Target Audience
○ Farmed animal protection organizations in the United States
- Top leadership
- DEI champions
- Up to 3 participants from each organization
  - Individual advocates of the global majority

- Encompass Goal
  - 1 per year
  - 30 participants, including 5-6 individual advocates on scholarship

- Monitoring and Evaluation
  - Participation records - to assess demand for this institute
  - Pre and post DEI concepts survey; client satisfaction survey - to assess Encompass’ performance
  - Assessment report - to gain insight into the challenges and dynamics organizations face, and how Encompass can help them grow
  - 1-year follow up survey - to assess long-term value to the participant; to gauge need for additional services
  - Encompass internal records (time, cost, etc.)

- Pricing and Budget - Priced according to client’s budget based on latest 990
  - Underpriced (as compared to similar events held outside the animal movement) in 2020 to satisfy presumed demand, with price increases expected every year thereafter
  - $50 discount for participants who fill out interest survey
  - $50 discount for early bird registration
  - 50% discount for 2nd and 3rd participants from the same organization
  - Will explore corporate sponsorships as a source of revenue

<table>
<thead>
<tr>
<th>Client Org Budget</th>
<th>Early Bird Fee, w/ Survey Discount</th>
<th>Early Bird Fee</th>
<th>Regular Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>PGM(^1) advocate w/o org affiliation</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Less than $2M</td>
<td>$325</td>
<td>$375</td>
<td>$425</td>
</tr>
<tr>
<td>$2M - $5M</td>
<td>$425</td>
<td>$475</td>
<td>$525</td>
</tr>
<tr>
<td>Over $5M</td>
<td>$525</td>
<td>$575</td>
<td>$625</td>
</tr>
<tr>
<td>Corporate Sponsorships</td>
<td></td>
<td></td>
<td>TBD</td>
</tr>
</tbody>
</table>

Ad-hoc and Retainer Services
- What

\(^1\) People of the global majority = PGM
• Short-term DEI consulting services for isolated, emergent needs

• Objectives
  ○ Offering a way for organizations to interface with Encompass around short-term needs. This is less of a priority for us organizationally so we are disincentivizing by having higher rates. However, we recognize that we are able to offer value during specific moments of need.

• Target Audience
  ○ Primary: Farmed animal protection organizations in the United States
  ○ Secondary: Funders
  ○ Secondary: Animal advocates of the global majority

• Encompass Goal
  ○ Engage 50%+ of long-term consulting clients

• Monitoring and Evaluation
  ○ Participation records - to assess demand for transformational projects
  ○ Client satisfaction survey - to assess Encompass’ performance
  ○ Phases reports - to gain insight into the challenges and dynamics organizations face, and how Encompass can help them grow
  ○ 1-year follow up survey - to assess long-term value to the organization; to gauge need for additional services
  ○ Encompass internal records (time, cost, etc.)

• Pricing - Priced according to client’s budget based on latest 990, subsidized through philanthropy

Research

State of the Movement Report

• What
  ○ Collaborate with a partner in designing, implementing, and analyzing a survey of farmed animal protection organizations in the U.S. using the Center for Global Inclusion as a guide
  ○ Encompass will produce a report explaining findings and issuing a racial DEI score card for the movement as a whole, based on benchmarks developed by the Center for Global Inclusion

• Objectives
  ○ Provide animal protection stakeholders clarity on where the movement thrives and where extra attention is needed
  ○ Provide the movement clarity on metrics to benchmark for future success
  ○ Provide the movement clarity on the types of DEI work that is needed and who needs to be involved

• Target Audience
  ○ Farmed animal protection organizations in the United States
  ○ Individual advocates of the global majority
  ○ Funders and supporters
• Evaluators
• DEI field professionals

• Encompass Goal
  o 1 comprehensive survey every 3-5 years to measure progress

• Monitoring and Evaluation
  o Participation records, to assess demand for the report
  o Longitudinal comparison
  o Encompass internal records (time, cost, etc.)
  o Report itself:
    ■ Gain insights into the challenges and dynamics organizations face, and how Encompass can help them grow
    ■ Gain insights into how the animal protection movement compares with other social justice movements

• Preliminary Budget - could vary greatly based on collaboration with partners

Global Majority Advocate Services

Global Majority Caucus

• What
  o Leadership skill training webinar series, every two months
  o Personal resiliency training webinar series, every two months
  o Mentorship & Sponsorship
    ■ Launching in January 2020. Will begin recruitment in November, 2019

• Objectives
  o Build community
  o Develop leadership skills
  o Develop personal resilience

• Target Audience
  o Animal advocates of the global majority worldwide

• Encompass Goal
  o Serve 100 advocates through webinar series with 30-40% engaging in each single event.
  o Serve 20 advocates through mentorship program

• Monitoring and Evaluation
  o Participation records - to assess demand for caucus projects
  o Client satisfaction survey - to assess Encompass’ performance; to assess Mentorship program
  o 1-year follow up survey - to assess long-term value to the advocates; to gauge need for additional services
  o Encompass internal records (time, cost, etc.)

• Budget
  o Revenue $0
  o Cost $42,000 per year
**Talent Database**

- **What**
  - Internal database of animal advocates of the global majority, their expertise and professional interests
  - Primary resource for identifying candidates for career-building opportunities, including speaking, moderating, board service, paid staff positions, paid leadership posts, etc.

- **Objectives**
  - Match advocates with career building opportunities
  - Increase the number of advocates of the global majority at all levels in the farmed animal advocacy movement

- **Target Audience**
  - Animal advocates of the global majority worldwide
  - Farmed animal advocacy nonprofit organizations worldwide
  - Secondary: Plant-based companies worldwide

- **Encompass Goal**
  - 100 advocates in database in 2020
  - 10 career-building matches

- **Monitoring and Evaluation**
  - Participation records - to assess demand for database and matching services, both from the advocate, the organization, and the media
  - Client satisfaction survey - to assess Encompass’ performance
  - 1-year follow up survey - to assess long-term value to the advocates; to gauge need for additional services
  - Encompass internal records (time, cost, etc.)

- **Budget**
  - Revenue $0
  - Cost $5,000 per year, including technology infrastructure and staff labor

**Operations**

**Organizational Structure and Staffing**

- **One FT Executive Director, since 2017**
  - Primary duties: Development, governance, communications, recruitment
  - Shared duties: Human resources, strategy, programs
  - Sabbatical in 2020 or 2021 - under consideration

- **One FT Managing Director, since 2019**
  - Primary duties: Finance, operations, compliance
  - Shared duties: Human resources, strategy, programs

- **Ad-hoc DEI consultants as independent contractors on a project basis. These are high-income positions and there is uncertainty about hiring costs**

- **Outsourced: graphic design, web development, executive coaching**
• One PT Administrative Assistant - under consideration, dependent on funding

Human Resources
• Performance review - quarterly progress reports; yearly review. Aligned with quarterly and annual goals, focused on performance improvement, staff development
• Payroll every 2 weeks
• Benefits: paid holidays, unlimited vacation, sick pay, Q-SEHRA health reimbursement, professional development stipend

Governance

Board of Directors
• Currently composed of four officers and directors: President, Treasurer, Secretary, and one non-officer board member
• Expertise: Equity building, volunteer management, sanctuary operations, legal
• Gaps: Fundraising, governance, HR knowledge

Advisory Council
• Currently composed of eleven members, five active
• Expertise: Fundraising, nonprofit leadership, corporate campaigns, writing, equity building, social media, plant-based/cultivated meat disruptors, visual media, legal, financial oversight
• Gaps: Consulting expertise, organizational development

Finance and Development

Revenue Generation
• Develop and focus on fee-for-service model, where consulting clients invest time and financial resources to DEI, a necessary step to build and demonstrate commitment for this work.
• Fee-for-service model allows Encompass to diversify revenue stream beyond philanthropic fundraising, providing stability for core programs and general operations. Gross profit from consulting programs is used to fund the Global Majority Caucus and to offer consulting subsidies for small groups. Nonprofits in other spaces have been successful with fee-for-service model2 and Encompass is learning from organizations and companies outside the animal movement.

Development

- Philanthropic gifts will be the primary source of revenue for the next two to three years and will continue to be an important secondary source of revenue for several years thereafter.
- Development plan includes solicitation from various sources:
  - Animal protection grants
  - Racial equity grants
  - Individual gifts of various sizes
  - Corporate sponsorships for DEI Institute
  - In-kind professional support (legal, web development, etc.)

Complete Encompass 2020 Budget

<table>
<thead>
<tr>
<th></th>
<th>Programs</th>
<th>Management &amp; General</th>
<th>Fundraising</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions, grants and gifts</td>
<td></td>
<td></td>
<td>$220,000</td>
<td>$220,000</td>
</tr>
<tr>
<td>Program service revenue</td>
<td></td>
<td>$40,875</td>
<td></td>
<td>$40,875</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>$40,875</td>
<td>$0</td>
<td>$220,000</td>
<td>$260,875</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries, other compensation, employee benefits</td>
<td>$103,300</td>
<td>$57,710</td>
<td>$35,295</td>
<td>$196,305</td>
</tr>
<tr>
<td>Professional fees and other payments to independent contractors</td>
<td>$10,000</td>
<td></td>
<td></td>
<td>$10,000</td>
</tr>
<tr>
<td>Meetings, conferences and events</td>
<td>$1,750</td>
<td>$10,650</td>
<td></td>
<td>$12,400</td>
</tr>
<tr>
<td>Office: printing, publications, postage, shipping,</td>
<td>$4,300</td>
<td></td>
<td>$2,770</td>
<td>$7,070</td>
</tr>
</tbody>
</table>
Future Potential Growth Opportunities

Exploring Other Client Areas
- Plant-based/cultivated meat industries
- Broader animal protection movement
- Other social justice focused movements

Exploring Other Equity Areas
- Gender equity
- Gender identity equity
- Disability equity

Exploring Other Lines of Service
- Executive DEI coaching
- Donor DEI coaching

Capabilities and Resources Gaps
- Coaching
- Adult education

Conclusion

We are presented with an incredible opportunity to make our movement more effective and equitable and we are actively seeking philanthropic support to implement our programs. Our role in this space is critically important—leaders and advocates from all over the world have been sharing the importance of this work and we are excited to be filling this gap.

You are critical to the success and the future of our movement. I look forward to discussing how we might partner to make this a reality.

Support us today!

Aryenish Birdie
Founder and Executive Director
abirdie@encompassmovement.org