

WINDOWDRESSERS STRATEGIC PLAN

July 1, 2021 - June 30, 2026
(FY2021-FY2026)

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Core Values Approved by Board March 12, 2021



INSULATING WINDOW INSERTS

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Overview

Mission: *WindowDressers brings community volunteers of all economic and social situations together to improve the warmth and comfort of interior spaces, lower heating costs, and reduce carbon dioxide pollution by producing low-cost insulating window inserts that function as custom, interior-mounted storm windows.*

Vision: *Every community has access to affordably insulated windows.*

Values: *WindowDressers values volunteers and volunteerism, communities in which neighbors know their neighbors, warm homes, actions to lower heating costs, and a climate and environmentally conscious way of life.*

Commitment to Equity and Inclusion: *You are welcome at WindowDressers regardless of who you are and what you believe. We strive to help reduce the many inequities in our society by encouraging and enabling everyone who wishes to participate in our programs. We actively seek diversity, equity and inclusiveness in our participants, volunteers, staff, and board members.*

The WindowDressers' strategic planning process has identified strategies that will best enable us to build momentum for achieving the organization's vision. This strategic plan is an update to the original plan approved by the Board of Directors on June 23, 2019. It serves as a roadmap for the next five years (FY 2021-2026). It will inform decisions about organizational goals and priorities and is a tool for assessing progress over that period. It is intended to be an organic, living document that is reviewed, revised and updated annually by staff and the board. The ongoing nature of creating, reviewing, and adopting this plan helps the board become committed to measurable goals and guides staff in determining priorities for implementation.

Due to the Covid-19 pandemic the Board of Directors and Executive Director agreed to suspend the 2020-2021 production season. In May 2020 the production facility previously located in the Lincoln Street Center was disassembled and moved into storage on the second floor of the PenBay Coating shop in Searsmont, Maine. Space that had been newly leased in the Rockland Industrial Park was abandoned as the site of the new production facility.

This update of the strategic plan is based on the expectation that the pandemic will be well enough managed to allow a full 2021-2022 season. Note that throughout this strategic plan, the legacy term "Community Build" is used in place of "community workshop".

Five focused initiatives are included in this update of the plan, each designed to achieve a specific strategic goal. Budget to support these initiatives will need to be separately developed pending Board approval of the plan. The Strategic Planning Team identified implementation milestones within each initiative. These are listed chronologically in Appendix A, subject to

revision and refinement through the annual Strategic Plan review process. These implementation plans will help direct the WindowDressers organization moving forward and will serve as the basis for more detailed measurable outcomes to be developed by the Executive Director for Board review and approval.

Initiative #1: Organizational Development

Goal: Cultivate an organizational culture where strong, collaborative leadership from Board and Staff is nurtured, appreciated and well coordinated

Background:

The rapid growth of WindowDressers since 2015 resulted in an increasing burden on the all-volunteer Board of Directors to directly manage the organization. Since hiring an Executive Director in July of 2019, the Board has shifted its focus away from management and towards governance (e.g. improving Board functioning, developing governance policies and strategic plans, and supporting and evaluating the Executive Director in her management role).

Implementation Plan:

- Year 1 (FY 2021: 7/2021-6/2022)
 - Maintain board membership at 12 or more with attention to filling needed skills gaps and reflecting the geography and diversity of the communities we serve.
 - Evaluate status and availability of “specialty” volunteers, e.g. individuals who provide software support and manufacture and maintain jigs.
 - Conduct annual review of Board policies and bylaws.
 - Conduct annual review and goal-setting for organization, Board, and Executive Director.
 - Develop values and equity and inclusion statements to reflect the results of the June 2020 special board meeting. Identify specific actions that will help WindowDressers develop an operation that reflects these statements.
 - Develop succession plans for Board and Staff members (including both paid and volunteer).
 - Evaluate rebranding and changing the name of the organization from WindowDressers to something else.
 - Develop a strategy to implement rebranding if that decision is made by the Board.

- Years 2-5
 - Maintain board membership at a minimum of 12 or more.
 - Evaluate status and availability of “specialty” volunteers, e.g. individuals who provide software support and manufacture and maintain jigs.

- Conduct annual review and goal-setting for organization, Board, and Executive Director.
- Conduct annual review of Board policies.
- Conduct annual review of the actions taken to support the equity and inclusion statement.

Initiative #2: Expand Insert Production

Goal: Expand geographic reach while maintaining economic diversity of participants and increasing the number of inserts produced.

Background:

Core to WindowDressers' mission is our Maine program. Over the last few years, WD has received numerous inquiries from out-of-State entities requesting support for the implementation of WD-style Community Builds. During the 2018-2019 build season, WD conducted a pilot project in Glover, VT and this grew to include seven builds the following season. It should be noted that three builds in Glover were conducted by three separate teams - this has been considered in other reports as one build. Interest from other New England states and beyond remains strong. Firm interest by groups in Connecticut and New Hampshire is developing and this strategic plan is based on expansion into one additional state in the 2021-2022 season and a second state in the 2022-2023 season. Due to the historic pattern of expansion driven primarily by local interest and activism, this plan does not specify the order of expansion. As a result, Expansion 1 and Expansion 2 are the terms used even though these are likely Connecticut and New Hampshire, the sequence of which is not prejudiced.

When the WD emerges from hibernation for the 2021-2022 season production levels will exceed that of the last full season. The total production in the 2019-2020 was 7,915 and the first year of this plan has a production goal of 9,400 inserts. As manufacturing and distribution refinements are assessed and implemented production levels will continue to increase annually. This will require substantial increases in production facilities as well as staff and volunteer time. The Executive Director will have the responsibility to implement these goals to expand beyond Maine in a way that is financially sustainable and continues to prioritize serving Maine communities.

Implementation Plan:

- Year 1 (FY 2021: 7/2021-6/2022)
 - Identify the "Expansion 1" state and develop partnerships with local entities or individuals in that state to establish the initial two Community Builds.

- Conduct a total of 47 Community Builds. Of these, 30 will be in Maine, 15 will be in Vermont, and two will be in an expansion state (Expansion 1). Expand into new communities as old Community Builds retire.
- Produce an average of 200 inserts per build.
- Produce at least 9,400 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
- Employ two Community Build managers.
- Year 2
 - Identify the “Expansion 2” state and develop partnerships with local entities or individuals in that state to establish the initial two Community Builds.
 - Conduct a total of 55 Community Builds. Of these, 30 will be in Maine, 18 will be in Vermont, five will be in Expansion 1, and two in an expansion state (Expansion 2). Expand into new communities as old Community Builds retire.
 - Produce an average of 200 inserts per build.
 - Produce at least 11,000 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
 - Employ two Community Build managers.
- Year 3
 - Conduct a total of 67 Community Builds. Of these, 30 will be in Maine, 22 will be in Vermont, 10 will be in Expansion 1, and five in Expansion 2. Expand into new communities as old Community Builds retire.
 - Produce an average of 200 inserts per build.
 - Produce at least 13,400 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
 - Employ two to three Community Build managers.
- Year 4
 - Conduct a total of 81 Community Builds. Of these, 30 will be in Maine, 26 will be in Vermont, 15 will be in Expansion 1, and 10 in Expansion 2. Expand into new communities as old Community Builds retire.
 - Based on success of expansion in Years 1 through 3, consider expansion into a fifth and possible sixth state.
 - Produce an average of 200 inserts per build.
 - Produce at least 16,200 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
 - Employ three Community Build managers.
- Year 5
 - Conduct a total of 93 Community Builds. Of these, 30 will be in Maine, 30 will be in Vermont, 18 will be in Expansion 1, and 15 in Expansion 2. Expand into new communities as old Community Builds retire.
 - Based on the success of expansion in Years 1 through 4, consider expansion into additional states.
 - Produce an average of 200 inserts per build.

- Produce at least 18,600 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
- Employ three to four Community Build managers.

Initiative #3: Provide Production Facility

Goal: Provide production facility space adequate for meeting production goals.

Background:

A combination of factors, primarily expiration of the lease at the Lincoln Street Center (LSC) in Rockland and recent increases in WD production levels, led to a Board decision to move to new leased space. In January 2020 WD signed a lease for a 4,800 square foot light industrial building in the Rockland Industrial Park. Planning for the production facility layout was nearing completion as the Covid-19 pandemic intensified to a point where the Board and Executive director decided to significantly curtail the 2020-2021 season. On that basis the landlord agreed to allow WD to abandon the lease as no interior work on the space had begun.

In May 2020 the WD staff and volunteers dismantled the production facility and moved the equipment, supplies, and other WD property into storage on the second floor of the PenBay Coating (PBC) facility in Searsmont, Maine. Use of that space has been identified for use as the new WD production facility when WD re-starts in FY 2021.

This strategic plan is based on the concept of milling, cutting, and painting wood for the entire insert production for at least the first three years of the plan in one facility. Materials and supplies for all Community Builds will be managed and sent from that one production facility. By Year 4 the plan anticipates one additional wood processing facility will be added to support the increased insert production anticipated in Years 4 and 5.

Implementation Plan:

Year 1 (FY 2021: 7/2021-6/2022)

- Design layout for new production space and develop jigs, bins, benches and other necessary infrastructure for insert production by April 2021.
- Establish the production facility on the second floor of the PBC shop in Searsmont, Maine in the late Spring or early Summer of 2021.
- Hire additional production and build management staff as required.

Year 2

- Evaluate limitations and advantages and decide the desirability of maintaining the production facility on the second floor of the PBC shop in Searsmont, Maine.
- Pending a decision about the mid- to long-term desirability of maintaining the production facility on the second floor of the PBC shop, identify new leased space if appropriate.
- Develop a fundraising plan if production facility relocation is decided.

Year 3

- Raise funds and implement production facility relocation if such a decision is made in Year 2.
- Evaluate the need for an additional production facility.

Years 4-5

- Raise funds and establish an additional production facility if such a decision is made in Year 3.

Initiative #4: Refine Operational Processes

Goal: Improve efficiency of manufacturing and distribution processes to meet goals for expanded output.

Background:

WindowDressers' production has reached a level where manufacturing and distribution processes that worked well with a lower output are reaching the limit of their scalability. Comprehensive assessment of manufacturing and distribution processes that began a year ago will continue to guide planning for streamlining operations in order to meet five-year production goals.

Implementation Plan:

- Year 1 (FY 2021: 7/2021-6/2022)
 - Continue to assess additional production refinements. Make plans as appropriate.
 - Define and communicate protocols for receiving materials and supplies to be used by WD at the PBC shop by Summer 2021.
 - Define and communicate protocols for Community Builds to pick up and drop off gear and supplies at the PBC shop by Summer 2021.
 - Continue to assess the WindowDressers software environment and maintain a software revision/implementation plan as appropriate.
 - Identify and document protocols for jig and equipment maintenance and replacement.
- Years 2-5
 - Continually assess implementation of refinements and add new refinements as needed.
 - Continually assess protocols for Community Builds to pick up and drop off gear and supplies and modify as needed.
 - Continue to assess the WindowDressers software environment and maintain a software revision/implementation plan as appropriate.

Initiative #5: Ensuring Diversity, Equity and Inclusion

Goal: Ensure diversity, equity and inclusiveness in participants, volunteers, staff and board members so that programs consistently deliver the benefits of our product and community-building focus to marginalized communities.

Background:

On May 25, 2020 the televised killing of George Floyd by the Minneapolis, Minnesota police tipped the United States into a national conversation about racism. Widespread events since then focussed an increased awareness and discussion of systemic racism throughout the country. At the June 5, 2020 Board meeting, Laura Seaton led a brief discussion about developing specific actions WindowDressers might take to address antiracism. The Board convened a special meeting on July 24, 2020 with the goal of identifying programmatic activities and actions to ensure WindowDressers will actively work at all levels against racism specifically and “otherism” generally.

Implementation Plan:

- Year 1 (FY 2021: 7/2021-6/2022)
 - Continue to implement an antiracism values statement and identify and implement concrete actions to move WD toward the values described in the statement.
 - Conduct an internal audit to ensure against inherent or implied bias in hiring and recruitment materials, governance documents, volunteer trainings and guidelines, and marketing and outreach materials. Edit these program components to explicitly ensure equity, diversity and inclusion of all people.
 - Conduct an audit of existing Community Builds to make sure we have builds that are serving communities where there are more **black**, indigenous, and other **people of color** (BIPOC). Identify additional communities where we want to prioritize more engagement (e.g., Lewiston Somalian and Brunswick immigrant communities, Native communities).
 - Survey the local coordinators to identify potential “otherisms” that may be evident in local builds.
 - Actively collaborate with at least one new BIPOC community to develop a Community Build.
 - Review our suppliers to ensure we’re dealing with companies that don’t exploit workers and communities of color. Focus on working with BIPOC business owners using the BlackOwnedMaine website (<https://www.blackownedmaine.com>).
- Years 2-5
 - Develop and maintain strategies to identify and serve BIPOC participants.

- Conduct an external audit to ensure against inherent or implied bias in hiring and recruitment materials, governance documents, volunteer trainings and guidelines, and marketing and outreach materials.
- Identify and implement training programs for Board, staff, and volunteers including focus on anti-racism, systemic racism, and implicit bias. Identify incentives to maximize effectiveness and encourage genuine interest and active participation.
- Actively collaborate with at least one new BIPOC community to develop a Community Build.
- Gather in a regularly scheduled online forum with Local Coordinators and volunteers with the goal of ensuring equity, diversity and inclusion of all people in all aspects of the WD program.

Appendix A: Year-by-Year Timeline of WindowDressers Initiatives

Year 1 (FY 2021: 7/2021-6/2022)

- Governance
 - Maintain board membership at 12 or more with attention to filling needed skills gaps and reflecting the geography and diversity of the communities we serve.
 - Evaluate status and availability of “specialty” volunteers, e.g. individuals who provide software support and manufacture and maintain jigs.
 - Continue to implement an antiracism values statement and identify and implement concrete actions to move WD toward the values described in the statement.
 - Conduct annual review of Board policies and bylaws.
 - Conduct annual review and goal-setting for organization, Board, and Executive Director.
 - Conduct annual review of the actions taken to support the equity and inclusion statement.
 - Develop succession plans for Board and Staff members (including both paid and volunteer).
 - Evaluate rebranding and changing the name of the organization from WindowDressers to something else.
 - Develop a strategy to implement rebranding if that decision is made by the Board.
 - Conduct an internal audit to ensure against inherent or implied bias in hiring and recruitment materials, governance documents, volunteer trainings and guidelines, and marketing and outreach materials. Edit these program components to explicitly ensure equity, diversity and inclusion of all people.
- Community Builds
 - Identify the “Expansion 1” state and develop partnerships with local entities or individuals in that state to establish the initial two Community Builds.
 - Conduct a total of 47 Community Builds. Of these, 30 will be in Maine, 15 will be in Vermont, and two will be in an expansion state (Expansion 1). Expand into new communities as old Community Builds retire.
 - Produce an average of 200 inserts per build.
 - Produce at least 9,400 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
 - Conduct an audit of existing builds to make sure we have builds that are serving communities where there are more **black**, **indigenous**, and other **people of color** (BIPOC). Identify additional communities where we want to prioritize more engagement (e.g., Lewiston Somalian and Brunswick immigrant communities, Native communities).

- Survey the local coordinators to identify potential “otherisms” that may be evident in local builds.
- Actively collaborate with at least one new BIPOC community to develop a Community Build.
- Hire two Community Build managers.
- Production and Production Facility
 - Design layout for new production space and develop jigs, bins, benches and other necessary infrastructure for insert production by April 2021.
 - Establish the production facility on the second floor of the PBC shop in Searsmont, Maine in the late Spring or early Summer of 2021.
 - Hire production staff as required.
 - Continue to assess additional production refinements. Make plans as appropriate.
 - Define and communicate protocols for receiving materials and supplies to be used by WD at the PBC shop by Summer 2021.
 - Define and communicate protocols for Community Builds to pick up and drop off gear and supplies at the PBC shop by Summer 2021.
 - Maintain a software revision/implementation plan.
 - Identify and document protocols for jig and equipment maintenance and replacement.
 - Review WD suppliers to ensure they are companies that don’t exploit workers and communities of color. Focus on working with BIPOC business owners using the BlackOwnedMaine website (<https://www.blackownedmaine.com>).

Year 2

- Governance
 - Maintain board membership at a minimum of 12.
 - Evaluate status and availability of “specialty” volunteers, e.g. individuals who provide software support and manufacture and maintain jigs.
 - Conduct annual review and goal-setting for organization, Board, and Executive Director.
 - Conduct annual review of Board policies.
 - Conduct annual review of the actions taken to support the antiracism values statement.
 - Identify and implement training programs for everyone involved, including focus on anti-racism, systemic racism, and implicit bias. Identify incentives to maximize effectiveness and encourage genuine interest and active participation.
 - Gather in a regularly scheduled online forum with Local Coordinators and volunteers with the goal of ensuring equity, diversity and inclusion of all people in all aspects of the WD program.
- Community Builds

- Identify the “Expansion 2” state and develop partnerships with local entities or individuals in that state to establish the initial two Community Builds.
- Conduct a total of 55 Community Builds. Of these, 30 will be in Maine, 18 will be in Vermont, five will be in Expansion 1, and two in Expansion 2. Expand into new communities as old Community Builds retire.
- Develop strategies to identify BIPOC participants. Collaborate to market.
- Produce an average of 200 inserts per build.
- Produce at least 11,000 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
- Actively collaborate with at least one new BIPOC community to develop a Community Build.
- Employ two Community Build managers.
- Identify the “Expansion 2” state and develop partnerships with local entities or individuals in that state to establish the initial two Community Builds.
- Production and Production Facility
 - Evaluate limitations and advantages and decide the desirability of maintaining the production facility on the second floor of the PBC shop in Searsmont, Maine.
 - Pending a decision about the mid- to long-term desirability of maintaining the production facility on the second floor of the PBC shop, identify new leased space if appropriate.
 - Develop a fundraising plan if production facility relocation is decided.
 - Continually assess implementation of refinements and add new refinements as needed.
 - Continually assess protocols for Community Builds to pick up and drop off gear and supplies and modify as needed.
 - Continue to assess the WindowDressers software environment and maintain a software revision/implementation plan as appropriate.

Year 3

- Governance
 - Maintain board membership at a minimum of 12.
 - Evaluate status and availability of “specialty” volunteers, e.g. individuals who provide software support and manufacture and maintain jigs.
 - Conduct annual review and goal-setting for organization, Board, and Executive Director.
 - Conduct annual review of Board policies.
 - Conduct annual review of the actions taken to support the antiracism values statement.
 - Conduct an external audit to ensure against inherent or implied bias in hiring and recruitment materials, governance documents, volunteer trainings and guidelines, and marketing and outreach materials.

- Maintain training programs for everyone involved, including focus on anti-racism, systemic racism, and implicit bias. Identify incentives to maximize effectiveness and encourage genuine interest and active participation.
- Gather in a regularly scheduled online forum with Local Coordinators and volunteers with the goal of ensuring equity, diversity and inclusion of all people in all aspects of the WD program.
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 - Produce an average of 200 inserts per build.
 - Maintain strategies to identify BIPOC participants. Collaborate to market.
 - Produce at least 13,400 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
 - Actively collaborate with at least one new BIPOC community to develop a Community Build.
 - Employ two Community Build managers.
- Production and Production Facility
 - Raise funds and implement production facility relocation if such a decision is made in Year 2.
 - Evaluate the need for an additional production facility.
 - Continually assess implementation of refinements and add new refinements as needed.
 - Continually assess protocols for Community Builds to pick up and drop off gear and supplies and modify as needed.
 - Continue to assess the WindowDressers software environment and maintain a software revision/implementation plan as appropriate.

Year 4

- Governance
 - Maintain board membership at a minimum of 12.
 - Evaluate status and availability of “specialty” volunteers, e.g. individuals who provide software support and manufacture and maintain jigs.
 - Conduct annual review and goal-setting for organization, Board, and Executive Director.
 - Conduct annual review of Board policies.
 - Conduct annual review of the actions taken to support the antiracism values statement.
 - Maintain training programs for everyone involved, including focus on anti-racism, systemic racism, and implicit bias. Identify incentives to maximize effectiveness and encourage genuine interest and active participation.

- Gather in a regularly scheduled online forum with Local Coordinators and volunteers with the goal of ensuring equity, diversity and inclusion of all people in all aspects of the WD program.
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 - Produce an average of 200 inserts per build.
 - Maintain strategies to identify BIPOC participants. Collaborate to market.
 - Produce at least 16,200 inserts, 25%-35% of which will be for low-income households and evaluated each year as part of the budget cycle.
 - Actively collaborate with at least one new BIPOC community to develop a Community Build.
 - Employ three Community Build managers.
- Production and Production Facility
 - Raise funds and establish an additional production facility if such a decision is made in Year 3.
 - Continually assess implementation of refinements and add new refinements as needed.
 - Continually assess protocols for Community Builds to pick up and drop off gear and supplies and modify as needed.
 - Continue to assess the WindowDressers software environment and maintain a software revision/implementation plan as appropriate.

Year 5

- Governance
 - Maintain board membership at a minimum of 12.
 - Evaluate status and availability of “specialty” volunteers, e.g. individuals who provide software support and manufacture and maintain jigs.
 - Conduct annual review and goal-setting for organization, Board, and Executive Director.
 - Conduct annual review of Board policies.
 - Conduct annual review of the actions taken to support the antiracism values statement.
 - Maintain training programs for everyone involved, including focus on anti-racism, systemic racism, and implicit bias. Identify incentives to maximize effectiveness and encourage genuine interest and active participation.
 - Gather in a regularly scheduled online forum with Local Coordinators and volunteers with the goal of ensuring equity, diversity and inclusion of all people in all aspects of the WD program.
- Community Builds

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