

Revised 03/30/2022



# SFFILM Strategic Plan 2022–24

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Movies  
made.

Movies  
shared.

Movies  
loved.







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**CASTRO**

**SFFILM DOC STORIES NOV 4-7 GET TICKETS SFFILM.ORG**  
**WELCOME BACK TO THE MOVIES**

SFFILM DOC STORIES  
DAY 2 LEAD US HOME  
ASCENSION

SFFILM DOC STORIES  
DAY 2 LEAD US HOME  
ASCENSION

NAILS

DOC  
STORIES



Born in 1957 as a bold and audacious endeavor to bring international films to the Bay Area, the San Francisco International Film Festival paved the way for what SFFILM is today: a flagship organization generating artist support, education, and exhibition year round. This evolution embodies the spirit of innovation, resilience, and cultural leadership of the San Francisco Bay Area. And it is that spirit that has allowed SFFILM to continue and even expand its offerings and programs through online engagements during the unprecedented world shut down in 2020–21 due to Covid.

The next few years hold tremendous opportunities for SFFILM—establishing a new hub for filmmaking with the SOMA building, creating programs that engage new audiences and revitalize neighborhoods, and championing ways to make sure that independent voices stay independent. The three pillars of our work—artist development, education, and exhibition—continue to lead the way, with a firm eye towards diverse perspectives, accessible programs, meaningful impact, and joyful community building. The core belief that film is an indispensable art form and one that should be available to all as a storytelling platform drives us. Film holds the unique power to generate understanding of our world, create cultural and societal impact, and inspire a next generation to dream big. This is more vital than ever, and we are poised to take that on.

In order to accomplish this, our Strategic Plan sets a course to strengthen our internal structures and leadership practices and enhance our financial planning and support. By focusing time and investing resources in this way, we will fulfill our role and vision as a preeminent champion of films and filmmakers and a vital Bay Area cultural institution.

Anne Lai  
Executive Director

Lisa Kleiner Chanoff  
Chair, Board of Directors



## EXECUTIVE SUMMARY

SFFILM's board and staff leaders initiated a strategic planning process in the spring of 2021. It was hoped that the process would:

1. Clarify the organization's mission, vision, and values
2. Provide a foundation for the new executive director to guide the organization
3. Strengthen the organization's operational processes
4. Catalyze efforts to develop sustainable funding

The process was spearheaded by a staff and board strategic planning task force and a consultant from Mission Met LLC, a firm that specializes in strategic planning for small nonprofits.

Over the course of several months during 2021, the staff and board engaged in numerous informational interviews and group planning sessions to provide insights into SFFILM's strategic needs and future direction. Due to concerns about the Covid pandemic, all of the meetings were conducted remotely.

Four strategic priorities emerged from the process:

5. **Staff Culture:** Invigorate and develop the staff culture
6. **Leadership:** Deepen the effectiveness of the staff and board leadership teams
7. **Funding:** Implement a sustainable fund and revenue development strategy
8. **Processes:** Document and execute key processes across the organization

As presented on the following pages, this strategic plan has two core sections:

### Section 1: Our Compass

### Section 2: Focus Areas and Goals

**Our Compass** serves as SFFILM's "north star" to provide long-term direction to the staff and board and includes the following:

- Strategic Priorities
- Vision Statement
- Mission Statement
- Core Values

**Focus Areas** are categories for capturing and organizing goals. It is expected that the Focus Area topics will remain somewhat unchanged in subsequent strategic plans.

The six focus areas are:

Focus Area I	Staff Investment
Focus Area II	Leadership and Management
Focus Area III	Financials
Focus Area IV	Brand Strategy
Focus Area V	Programs
Focus Area VI	Board Engagement and Development

Each of the focus areas has a three-year vision and is supported by goals of up to one year in length. In this way the plan maintains both a longer-term organizational vision and a shorter-term set of relevant actions.

**The focus areas and goals will be reviewed and revised on a regular basis, ensuring that the plan stays relevant and adaptable.**

Members of the staff and board have documented roles as champions of the overall plan, focus areas, and goals.



# SECTION 1 : OUR COMPASS



STRATEGIC PRIORITIES

- 1. **Culture:** Strengthen the staff culture
- 2. **Leadership:** Reinforce the staff and board leadership teams
- 3. **Funding:** Implement a sustainable fund and revenue development strategy
- 4. **Processes:** Document and implement key processes across the organization

VISION STATEMENT

Transforming the world through the creativity and inspiration of film.

MISSION STATEMENT

SFFILM ensures independent voices in film are welcomed, heard, and given the resources to thrive. SFFILM connects and inspires audiences, students and teachers, and filmmakers through film exhibition, youth education, and artist development programs.

CORE VALUES

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## Equity

We seek to foster a rich, diverse, and inclusive Bay Area film community that is at its core embracing of all identities and accessible to all. We believe that film can be reflective of the equitable society we seek and are dedicated to building programs that uplift the diversity found throughout the Bay Area.

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## Curiosity

We approach our work with bold curiosity and we celebrate filmmakers who do the same. We embrace a learner's mindset and view the status quos in our organization, our community, and our industry through a lens of radical inquiry.

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## Intentionality

We are purposeful in how we define and do our work. We embrace a holistic and process oriented approach, setting bold and measurable goals to maximize impact and sustainability both for our organization and community.

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## Collaboration

We center trust and open communication both with our staff and our community to support finding the best organizational and creative outcomes together. We celebrate diverse life experiences and perspectives and create an environment where everyone can engage as their most authentic selves.





## SECTION 2: FOCUS AREA AND GOALS



CHAMPION

HR Senior Manager

THREE-YEAR VISION

Within there years we will have:

**1. Compensation**

Implemented a documented compensation strategy to ensure that staff pay is moving in a direction of equity with other similar Bay Area organizations.

**2. Growth and Retention**

Further implemented a documented performance management system that strengthens the supervisor-staff member relationship, clarifies roles and responsibilities, reinforces goal-based individual outcomes, and provides professional development pathways.

**3. Internal Communication**

Refined, documented and implemented our internal communications processes, to codify how we as an organization effectively use information sharing and collaboration tools including meetings, chat, email, and phone/texts.

**4. Technology Support**

Implemented a documented training and support process for technology such as Basecamp, an organization-wide CRM, etc.

**5. Staff Wellbeing**

Documented SFFILM's approach to staff wellbeing and reinforcing a positive work culture. For example, effectively using the office building for collaboration and camaraderie; fueling creativity and inspiration among staff; ensuring adequate work/life balance norms and capacity limits are upheld; and regularly sourcing staff feedback for evaluating success.

**Staff Investment: One Year Goals**

GOAL TOPIC	GOAL	START DATE	END DATE	CHAMPIONS	KEY TEAM MEMBERS
1. Compensation	Document and implement a formalized compensation strategy for full time staff levels that includes: 1) pay bands that are competitive in the wider Bay Area non-profit landscape and 2) structured guidelines for COLA, merit pay and promotions. Communicate structure internally with staff.	Jan 1 2022	Jun 30 2022	HR Senior Manager	HR Senior Manager, Anne Lai, Lisa Chanoff, Jason Fish
2. Growth and Retention	Document SFFILM's approach to staff growth and retention, centered on use of OKRs (Objectives and Key Results) in departmental and individual goal setting and evaluation. Includes: <ul style="list-style-type: none"> <li>Refined performance management process</li> <li>Increased participation in professional development</li> <li>Streamlined hiring and onboarding processes</li> </ul>	Jan 1 2022	Aug 31 2022	HR Senior Manager	HR Senior Manager, Senior Leadership
3. Internal Communication	Document and implement a best practices/expectations guide for internal communications tools. Defining org-wide norms for use of email, chat, Basecamp, meetings, and phone calls.	May 15 2022	Dec 31 2022	TBD	Justine Hebron, HR Senior Manager, Jordan Menashe, Nina Garay
4. Technology Support	Formalize documentation and guidelines for best practices use of Google Suite including but not limited to filing and folder structures, document naming conventions, and rules for memorializing seasonal staff and contractors work in org files.	Jan 1 2022	Dec 31 2022	TBD	Ryan Delgado, Senior Leadership
5. Staff Wellbeing	Institutionalize consistent practice of inclusive work culture best practices – RACI modeling, 13 cultural competencies, culture of feedback, continued DEIA trainings, and measurement of demographic evaluation of staff and leadership.	Jan 1 2022	Dec 31 2022	HR Senior Manager, Jordan Menashe	HR Senior Manager, Jordan Menashe, Senior Leadership



## CHAMPIONS

Anne Lai and Jordan Menashe

## THREE-YEAR VISION

Within there years we will have:

### **1. Leadership Teams**

- a. Reinforced a regular, documented, and strategic process for the executive director, board president, and vice president to meet, provide professional guidance, and ensure that the organization is tracking to its strategic plan.
- b. Built a regular and documented process for strengthening the relationships and effectiveness of the staff senior leadership team.

### **2. DEIA -- Diversity, Equity, Inclusion, and Accessibility**

- a. Continued to invest in an organized and ongoing strategy of integrating DEIA into all that SFFILM does, both programmatically, and operationally. Utilize metrics of success.
- b. Created the structured, regular space for internal DEIA conversations around current best practices and staff values, as well as the actions to be implemented as a result.
- c. United the Inclusion and Disability advisory boards into an effective advocate and braintrust for the organization.

### **3. Organizational Culture**

- a. Built a stronger culture of celebration by authentically discussing and highlighting all of the progress and great results of things that SFFILM is/has accomplished.
- b. Built a stronger culture of celebration and understanding of all aspects of SFFILM by creating staff opportunities to experience new programmatic activities.
- c. Created a clearly defined set of definitions on key values that we ask ourselves to abide by.
- d. Reinforced a set of tools that are practiced by all across the organization (e.g., RACI modeling, 13 Cultural Competencies, etc.)
- e. Fully lived in a clear and well-understood mission and vision.

### **4. Management Training**

- a. Invested in training for management skills at all levels of staffing
- b. Documented a sustainable and replicable process of onboarding and refreshing all staff (including seasonal staff) on our definitions and tools.

**Leadership and Management: One Year Goals**

GOAL TOPIC	GOAL	START DATE	END DATE	CHAMPIONS	KEY TEAM MEMBERS
1. Leadership Development	Design, develop, and document a Leadership development program for senior staff.	Mar 1 2022	Sep 1 2022	Anne Lai	Senior Leadership
2. Leadership Development	Clarify and document an agenda meeting process for senior leadership level meetings. (can create 3 sub items under this)  (e.g., Develop a clear set of guidelines for Senior Leadership meetings and effectiveness)	Jan 1 2022	Jun 1 2022	Jordan Menashe	Senior Leadership
3. Executive + Board Leadership Development	Clarify and document a meeting and reporting process for ED and Board President/VP  (e.g., Implement an updated review process for ED with Board P & VP)	Jan 1 2022	Aug 1 2022	Anne Lai	Board President & VP
4. Leadership Development	Identify, define, and document the purpose and intentions of Senior Leadership.	Jan 1 2022	Dec 31 2022	Anne Lai, Jordan Menashe	Senior Leadership
5. DEIA	Generate a public report on our demographic survey work (staff, board, submissions)	May 1 2022	Feb 1 2022	Anne Lai	HR Senior Manager, Jordan Menashe, Senior Leadership
6. DEIA	Propose and define the purpose, integration, and engagement of a combined Inclusion and Disability Advisory Boards	Jan 1 2022	Dec 31 2022	Anne Lai, Managing Director	Jordan Menashe, Masashi Niwano
7. Organizational Culture	Develop and document a clear approach to staff recognition, morale, and communication.  (e.g. Hold an annual staff retreat; develop a buddy system for new hires)	Feb 1 2022	Dec 31 2022	Anne Lai, Jordan Menashe	Nina Garay, Camille Gwise, Tiffany Rapp-Sekine, Ankoor Patel



CHAMPIONS

Carrie Cottini/Director of Development, and Anne Lai

THREE-YEAR VISION

Within three years we will have further institutionalized a documented fund development strategy and financial management process so that SFFILM can attain financial stability and sustainability, including:

**1. Planning**

Strategies, tactics and multi-year revenue goals/percentages for:

- a. Board contributions
- b. Individual giving
- c. Corporate funding
- d. Foundations
- e. Memberships
- f. Earned revenue
- g. Unrestricted vs. restricted funding

**2. Roles and Responsibilities**

Clarified roles and responsibilities for:

- a. The development team
- b. The executive director
- c. The development committee
- d. The board in general
- e. Program leaders (Artist Development, Programming, and Education)
- f. The partnership between the finance and development teams.

**3. Ongoing Support**

A strategy for moving towards increased pledged-based and cyclical giving, as well as a focus on organization/brand support over specific event offerings.

**4. Operational Reserves**

A strategy for creating six months of operational reserves.

**5. Donors with Common Goals and Interests**

A strategy for cultivating relationships and communities of donors with common goals and interests.

**6. Financial Management Process**

A refined budgeting and financial management process, that includes budgeted projections for three years.

**7. Relationship-based Fund Development**

A description of its relationship-based fund development ethic, including our approach towards the types of funders we are seeking and cultivating with intentionality.

**Financials: One Year Goals**

GOAL TOPIC	GOAL	START DATE	END DATE	CHAMPIONS	KEY TEAM MEMBERS
1. Fund Development	<p>Document and implement a fund development strategy that sets benchmarks for achievement in the following categories, with a priority on strategies that increase unrestricted funding:</p> <ul style="list-style-type: none"> <li>• Board</li> <li>• Individual</li> <li>• Corporate</li> <li>• Foundation/Government</li> <li>• Membership</li> <li>• Earned Revenue</li> </ul>	Jan 1 2022	Aug 1 2022	Anne Lai, Director of Development	Anne Lai, Director of Development, Carrie Cottini, Tiffany Rapp-Sekine, Justine Hebron, possibly board members
2. Fund Development	Document and implement a RACI model for SFFILM's fund development strategy to clarify roles and responsibilities within the revenue team.	Jan 1 2022	May 1 2022	Anne Lai, Director of Development	Senior Leadership
3. Financial Management	Refine and implement SFFILM's financial calendar and cycle to institutionalize regular reporting, annual audits, budgeting timelines and reforecasts.	Jan 1 2022	Dec 31 2022	TBD	LTD Global, Senior Leadership
4. Financial Management	Streamline financial management tools including but not limited to: Quickbooks Online, Bill.com, Donor Perfect, and Filemaker, to ensure effective systems integration and internal controls best practices adherence.	Jan 1 2022	Dec 31 2022	TBD	LTD Global, Senior Leadership

CHAMPIONS

Justine Hebron

THREE-YEAR VISION

Within three years we will have:

Further institutionalized a documented marketing and communications strategy to position SFFILM as a well-known and cornerstone Bay Area arts institution. The strategy will include:

**1. Overall Brand Strategy****2. Target Audience Strategy**

- a. Clarification of the target audiences
- b. The needs of each of these target audiences
- c. How SFFILM uniquely meets the needs of their target audiences
- d. A clear set of marketing and communication tactics (digital, media, etc.) to attract and engage the target audiences

**3. Measuring and Reporting**

A process for measuring and reporting progress on marketing and communication metrics.

**4. Roles and Responsibilities**

Clarified roles and responsibilities of the marketing and communications staff and any associated team member.

**5. Annual Budgeting**

An annual marketing and communications budgeting process.

**Brand Strategy: One Year Goals**

GOAL TOPIC	GOAL	START DATE	END DATE	CHAMPIONS	KEY TEAM MEMBERS
1. Communications Plan	<p>Create and launch implementation of an institutional Strategic Communications Plan the structure of which includes:</p> <ul style="list-style-type: none"> <li>• Brand strategy (integration of long-term Strategic Plan Goals with MarComm activities)</li> <li>• Target Audiences + Personas</li> <li>• Overall Messaging</li> <li>• Tailored Messaging by Audience</li> <li>• Program or Revenue Goals Mapped to Campaigns with KPIs</li> <li>• Tactics</li> </ul>	Nov 11 2022	Feb 22 2022	Justine Hebron, Anne Lai	Comms, Senior Leadership
2. Timeline	<p>Create and launch a replicable, annual timeline of external marketing campaigns aligned with programs. For example:</p> <ul style="list-style-type: none"> <li>• Exhibition Programming <ul style="list-style-type: none"> <li>◦ Festival</li> <li>◦ Special Presentations (incl. Donor Supported Programs like Sloan, SF Honors, etc.)</li> <li>◦ Member Screenings and Events</li> <li>◦ Doc Stories</li> <li>◦ Family Programming</li> </ul> </li> <li>• Artist Development <ul style="list-style-type: none"> <li>◦ Grants and Residency promo and reporting</li> <li>◦ Events</li> </ul> </li> <li>• Education <ul style="list-style-type: none"> <li>◦ SATF, SADS</li> <li>◦ Classroom</li> <li>◦ Camp</li> <li>◦ Residency</li> <li>◦ Events</li> </ul> </li> <li>• Membership: Acquisition and Retention</li> <li>• Strategic Partnerships <ul style="list-style-type: none"> <li>◦ Acquisition and Retention</li> <li>◦ Compliance</li> <li>◦ Community Partners</li> </ul> </li> <li>• Annual Fundraising</li> <li>• Awards Night</li> </ul>	Nov 10 2021	Jan 1 2022	Justine Hebron	Comms, Senior Leadership



## CHAMPIONS

Keith Zwolfer, Masashi Niwano, and Jessie Fairbanks

## THREE-YEAR VISION

Within three years, SFFILM's three programs departments (Education, Artist Development, and Programming) will have:

### **1. Clearly Communicated Scope of Integration**

The leaders of each of the three programmatic areas will have established a regular collaborative process to ensure that SFFILM's programs are best integrated in pursuit of the mission and vision.

### **2. Documentation of Process**

Effectively documented the replicable processes for running each of the core programs; possibly captured in Basecamp.

### **3. SFFILM Programs**

Harnessed our skills as curators, funders, commissioners, and ambassadors of the film industry to have evaluated, adapted, and created bold and exciting programs that leverage local and national partnerships for growth opportunity and diversification of content, while also supporting audience development to inspire a broad community of film lovers.

### **4. Metrics and Outcomes**

Established a small set of key programmatic metrics and outcomes.

**Programs: One Year Goals**

GOAL TOPIC	GOAL	START DATE	END DATE	CHAMPIONS	KEY TEAM MEMBERS
1. SFFILM Supported Projects	Within each Artist Development grant cycle, all three departments will collaborate to identify and document opportunities to highlight SFFILM-supported artists (current and alumni) in both Education and Programmatic showcases.	Jan 1 2022	Dec 1 2022	Masashi Niwano	Keith Zwolfer, Jessie Fairbanks, Rod Armstrong, Ankoor Patel, Joshua Moore, Jordan Menashe, Sabrina Sellers, Joseph Flores
2. Education Programming	Document and implement the process by which Programming and Education will assist with identifying at least 30 films and filmmakers for School Days and Family Friendly Programs	Jan 1 2021	Dec 1 2022	Keith Zwolfer, Jessie Fairbanks	Rod Armstrong, Ankoor Patel, Joseph Flores
3. Engaging With Our Bay Area Home	Create the strategy for elevating the Bay Area through curatorial and venue choices across Programming, Education, and Artist Development.	Jan 1 2021	Dec 1 2022	Jessie Fairbanks, Rod Armstrong	Rod Armstrong, Ankoor Patel, Joseph Flores
4. Documentation of Progress	Co-write and disseminate a quarterly update highlighting exciting programs and areas of collaboration across Programs' three departments.	Jan 1 2021	Dec 1 2022	Keith Zwolfer, Jessie Fairbanks, Masashi Niwano, Justine Hebron	Rod Armstrong, Ankoor Patel, Joseph Flores

CHAMPIONS

Lisa Kleiner Chanoff

THREE-YEAR VISION

Within three years, SFFILM's board will will have:

**1. Reestablished Connections**

Reestablished a strong board community, relationships, and engagement that took a hit during Covid.

**2. Roles and Responsibilities**

Clarified roles and responsibilities for the board.

**3. Board Manual**

Developed a board policy and procedures "manual."

**4. Committees and Advisory Boards**

Refined the purpose and effectiveness of the committees and advisory boards.

**5. Diversity, Equity, Inclusion, and Accessibility**

Addressed DEIA in the board's composition and efforts.

**6. Board Size**

Grown the board to at least thirty members.

**Board Engagement and Development: One Year Goals**

GOAL TOPIC	GOAL	START DATE	END DATE	CHAMPIONS	KEY TEAM MEMBERS
1. Board Growth	Increase size of board to at least twenty-eight members.	Jan 1 2022	Dec 1 2022	Lisa Kleiner Chanoff	Barbara Tomber, Howard Roffman, Governance Committee
2. Board "Manual"	Complete the board policies and procedures "manual", to include a clarified set of board member roles and responsibilities.	Jan 1 2021	Apr 1 2022	Krutika Patel	Krutika Patel, Barbara Tomber
3. Board Committees	Strengthen the effectiveness of the board's committees and advisory boards, with a special focus on the DEIA advisory board.	Jan 1 2021	Dec 1 2022	Lisa Kleiner Chanoff	Krutika Patel, Committee Chairs
4. Board Relationships	Conduct one or two in-person board social gatherings.	Jan 1 2021	Dec 1 2022	Lisa Kleiner Chanoff	Krutika Patel, Nina Garay
5. Board Engagement	Create and implement an annual board engagement survey and analysis.	Jan 1 2021	Mar 1 2022	Lisa Kleiner Chanoff	Barbara Tomber, Krutika Patel
6. Board and Staff Engagement	Create, implement and document ideas and activities that help the board and staff get to know and understand each other better.	Jan 1 2021	Apr 1 2022	Lisa Kleiner Chanoff	Krutika Patel, Nina Garay



## GENERAL FINANCIAL IMPLICATIONS OF THE STRATEGIC PLAN

FOCUS AREA	REVENUE	EXPENSES
Focus Area I: Staff Investment	Increased productivity and staff morale to indirectly support achievement against revenue goals.	<ul style="list-style-type: none"> <li>• Implementation of compensation strategy including raises and increased benefits.</li> <li>• Staff training and consulting to support growth in DEIA.</li> <li>• Technology systems audits and R&amp;D and implementation of systems upgrades.</li> </ul>
Focus Area II: Leadership and Management	Increased productivity and staff morale to indirectly support achievement against revenue goals.	<ul style="list-style-type: none"> <li>• Leadership staff training in cultural competency and management skills.</li> <li>• Data analyst consultancy needed to support demographics study</li> <li>• Investment in annual staff retreat</li> </ul>
Focus Area III: Financials	Increased contributed revenue	<ul style="list-style-type: none"> <li>• Investment in donor cultivation tactics including hosting gatherings and dining</li> <li>• Development specific management systems</li> </ul>
Focus Area IV: Brand Strategy	Increased earned revenue	<ul style="list-style-type: none"> <li>• Publicity consulting to support brand awareness</li> <li>• Updating institutional assets to reflect future organizational vision</li> </ul>
Focus Area V: Programs	Increased earned revenue	<ul style="list-style-type: none"> <li>• Investment in Bay Area community engagement to reach broader constituent base</li> <li>• Investment in accessible venues and accessibility tools</li> </ul>
Focus Area VI: Board Engagement and Development	Increased board giving	No expense implications

Implementing a process of executing the plan is critical to the plan and organization's success.

A key element of this process will be to ensure that individuals have specific and documented roles within the plan, such as:

**1. Overall Champions:**

The executive director and board chair will serve as the co-champions of the overall plan and ensure that

**2. Focus Area Champions:**

Each of the six focus areas have at least one champion

**3. Goal Champions and Key Team Members:**

Each of the goals have at least one champion and key team member

Each of the goals have a start and due date and have been written in such a way that progress will be able to be tracked and measured.

The goals will be tracked in a Google Sheet that will be accessible to all of the staff and board.

A calendar will be put in place to support both a monthly and quarterly cadence for reviewing, revising, and implementing the plan's Compass, focus areas, and goals.

*The ultimate hope is that the plan and its execution will serve as a practical and extremely useful tool to guide SFFILM into an even more successful future.*

