

FIRST NATIONS
DEVELOPMENT INSTITUTE

CALIFORNIA
TRIBAL FUND

insights & bites



September 2025 - July 2026

The California Tribal Fund will be hosting 6 webinars over the course of a year. Each session will go over different topics to support grantees overall learning and growth.

OUR TEAM



REBECCA TORTES

Director

Cahuilla, Payómkawichum,
and Assiniboine Sioux



DONALD SALCEDO

Lead Program Officer

Quechan Nation/ Pueblo of
Laguna



ELLA KOHLER

Program Officer

Sac & Fox

MISSION & VISION



Our mission is to invest in the viability and visibility of California Tribal Nations and communities.



We envision a future where California Native People — here since time immemorial — have authority over our homelands and honor our responsibility to our people, language and traditions to ensure our communities are recognized, strengthened and sustained.



OUR PROGRAM AREAS



Stewardship of Ancestral Lands & Waters

Rebecca Tortes



Youth & Culture

Donald Salcedo



Wildfire Relief & Climate Action

Rebecca Tortes



Food Sovereignty

Ella Kohler

WEBINAR SCHEDULE



01 Strategic Planning 101
➤ *September 17th, 2025*

02 Fundraising, Grant writing
& Resource Development
➤ *November 2025*

03 Project Management
➤ *January 2026*

04 Community Engagement
& Outreach
➤ *March 2026*

05 Avoiding Burnout
➤ *May 2026*

06 Grantee Stories
➤ *July 2026*

WHY THESE TOPICS?



“Based on responses to survey items that were not asked about in the TA portion of the survey, the following areas appear to be additional types of supports that would be useful for grantee partners:

- Strategic planning (60%)
- Support developing a communications manual (branding/style guide) (80%)
- Support developing a fiscal policy and procedures manual (45%)”



“Less than half of respondents reported having a strategic plan (40%, n=14) and two-thirds (n=10) of those with a strategic plan indicated they are currently updating their strategic plan or had done so in 2024”





JOHN HENDRIX

John Hendrix serves as Director of Economic Development for the Mississippi Choctaws and Principal Consultant of Economic Development Associates, LLC, bringing over 30 years of specialized experience in tribal economic development. As a Certified Economic Developer (CEcD) and Project Management Professional (PMP), he has provided strategic planning and capacity building services to more than 30 tribes nationwide. Hendrix has successfully created and implemented three Comprehensive Economic Development Strategies (CEDs). Recently honored with the 2025 United South & Eastern Tribes Chris Thompson Economic Development Award, Hendrix holds an MBA from Duke University and a BBA from Millsaps College.



LEARNING OBJECTIVES



Identify and understand the common elements of Strategic Plans



Share best practices/tools for an effective strategic planning process



Review best practices for implementation and updating



FOR TODAY



- Please turn your cameras on if possible

- Prepare to participate



- Type any questions in the chat and we will answer them at the end



- Slides and resources will be made available to you



POLL



What is the status of your organization in terms of Strategic Planning?

- A. We have a plan, and it is being implemented and updated
- B. We do not have a plan
- C. We have a plan, but it is not being implemented



In your experience, how beneficial is a Strategic Plan? (1-5)





OVERVIEW

Definition of a Strategic Plan:

A strategic plan is a living document that helps organizations move from where they are today to where they want to be by defining clear goals, strategies, and action steps while adapting to changing circumstances.



OVERVIEW

Potential Benefits of Having a Strategic Plan:

- Provides clear direction and focus for the organization
- Aligns resource allocation with intentionally selected priorities
- Prevents "mission creep" and scope drift
- Strengthens grant applications and fundraising efforts
- Enables proactive rather than reactive management



OVERVIEW

Common occurrences within Orgs that do not have a Strategic Plan

- Mission creep - taking on activities outside core purpose
- Staff working at cross-purposes without unified direction, leading to wasted resources and duplicated efforts
- Reactive decision-making instead of proactive planning
- Inability to measure or demonstrate impact effectively
- New Programs start enthusiastically but never completed or properly evaluated

COMMON ELEMENTS



Basic:

- Mission
- Targeted Impact
- Assessment/SWOT Analysis
- Strategic Directions & Goals
- Annual Work Plan



Advanced:

- Mission
- Vision
- Values/Culture
- Impact
- Theory of Change
- Long Range Target
- 3-Year Picture
- Assessment / SWOT Analysis
- Strategic Directions & Goals
- Annual Workplan
- Strategic Roadmap
- Implementation Tracking Plan



COMMON ELEMENTS



Basic:

- **Mission:** Defines the fundamental purpose of an organization - why it was created, what it does, and for whom it does it.
- **Targeted Impact:** Defines the intended outcomes and results an organization aims to achieve, describing how the community or population will be different because of the organization's work.
- **Assessment/SWOT Analysis:** A comprehensive evaluation of an organization's internal capabilities (strengths and weaknesses) and external environment (opportunities and threats) to identify what needs to change or improve.
- **Strategic Directions & Goals:** Define the key priorities and measurable achievements an organization commits to pursuing, providing a roadmap for decision-making and resource allocation.
- **Annual Work Plan:** Breaks down strategic goals into specific activities, projects, and milestones that will be accomplished within a 12-month period, including timelines, responsibilities, and resource requirements



COMMON ELEMENTS



Advanced:

- **Mission**
- **Vision:** A vision statement describes the future state an organization aspires to create - what the world or community will look like when the organization has successfully fulfilled its mission over time.
- **Values:** Values are the fundamental beliefs and principles that guide an organization's decisions, behaviors, and interactions, defining how it will operate and treat people while pursuing its mission
- **Impact**
- **Theory of Change:** A theory of change maps out the cause-and-effect relationships between what an organization does (activities) and the results it expects to achieve, showing the pathway from programs to lasting community change (i.e., impact)
- **Long Range Target:** A long range target is the organization's "North Star" - a clear, inspiring destination 10-20 years in the future that provides unwavering direction and helps guide all strategic decisions and priorities



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COMMON ELEMENTS



Advanced:

- **3-Year Picture:** A 3-year picture is a vivid, detailed description of what the organization will look like three years from now - including its size, capabilities, achievements, and impact - making the long range target feel tangible and achievable.
- **Assessment / SWOT Analysis**
- **Strategic Directions & Goals**
- **Annual Workplan**
- **Strategic Roadmap:** A strategic roadmap is a timeline of key milestones and resource allocation checkpoints that serve as "trip wires" to help the organization determine whether it's staying on track toward its 3-year picture and long range target
- **Implementation Tracking Plan:** An implementation tracking plan establishes the regular review cycles, progress measurements, and update processes that force the organization to actively use its strategic plan rather than letting it sit on a shelf.



KEY TERMS

MISSION CREEP:

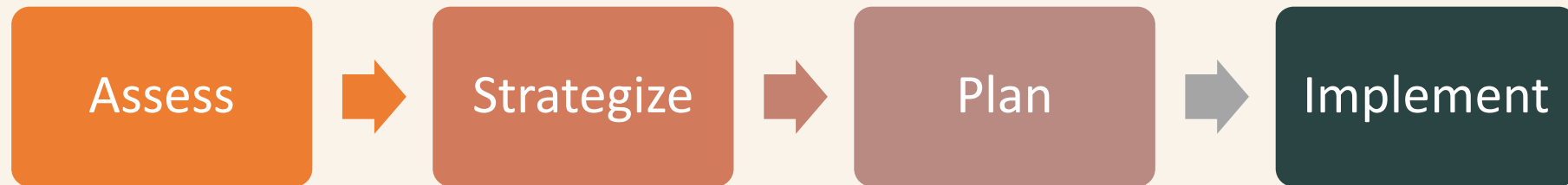
Mission creep occurs when an organization gradually takes on activities, programs, or responsibilities that fall outside its core mission, diluting focus and resources without a strategic decision to expand scope.

STAKEHOLDERS:

Stakeholders include everyone who has a "stake" in the nonprofit's mission and outcomes - from the community members it serves to the funders who support it, board members who govern it, and partners who work alongside it.



STRATEGIC PLANNING PROCESS



What do we need to prioritize and do differently to achieve our mission and increase our impact (vs. status quo / autopilot mode)

ASSESS | PROBLEMS & OPPORTUNITIES

- Organizational Performance & Capacity
- Community Needs
- Competitive Landscape

OBJECTIVE: Identify root problems and new opportunities

Common Tool: SWOT Analysis

INTERNAL FACTORS

STRENGTHS +

WEAKNESS -

EXTERNAL FACTORS

OPPORTUNITIES +

THREATS -



STRATEGIZE | PRIORITIZE & FOCUS

- Visioning
- Strategic Directions
- Goals & Objectives



PLAN | ROADMAP & WAYFINDING

- Strategic Goals & Objectives
- Resource Allocation
- Metrics / KPIs



IMPLEMENT | TRACK & ADAPT

- Long Range Target (5,10, or 20 year)
- 3-Year Picture
- 1-Year Work Plan
- 12-Week Action Plan

DISCUSSION

Q: Did your organization's circumstances change with the new administration?



LIVING DOCUMENT



3-5 Year Plan



Annual review and update (2-days)



Quarterly review and planning (1-day)



Monthly review and updates (1-2 hours)



CTF PLAN SHOWCASE

- Strengthen Team
- Expand Community Connections
- Strengthen Interdepartmental Connections
- Improve Communications
- Diversify Funding Base



CTF PLAN SHOWCASE

Focus Area	Targeted Long-Term Impact
Stewardship of Ancestral Lands and Water	<ul style="list-style-type: none">• Native people are seen as the appropriate stewards of their ancestral lands and waters• More ancestral lands are controlled and managed by tribes• More tribes have access to clean natural bodies of water• Strengthened Native stewardship of land and species using traditional ecological practices



CTF PLAN SHOWCASE

Metrics	2023 Baseline	By 12/2024	By 12/2026	By 12/2028
Impact	46 Communities 53% of Counties 30 New Grantees	55 Communities 60% of Counties 10+ New Grantees	75 Communities 70% of Counties 10+ New Grantees	90 Communities 75% + of Counties 10+ New Grantees
Funding - Incoming	1 New Funder	2 new funders with multi-year commitments >\$500K each	3 new funders with multi-year commitment >\$500K each	3 new funders with multi-year commitments >\$1M each
Average Grant Size	\$41,000	\$45,000	\$53,000	\$67,000
Grant Term	12-months	>10% of grants @ 24 months	>25% of grants @ 36-months	>50% of grants @36-months
Total Funding Mobilized	1.9M Mobilized	2.5M Mobilized	3.5M Mobilized	5M Mobilized



HELPFUL RESOURCES

- [Organizational Assessment Tool \(PDF\)](#) :

AmeriCorps

- [Nonprofit Leadership \(book\)](#):

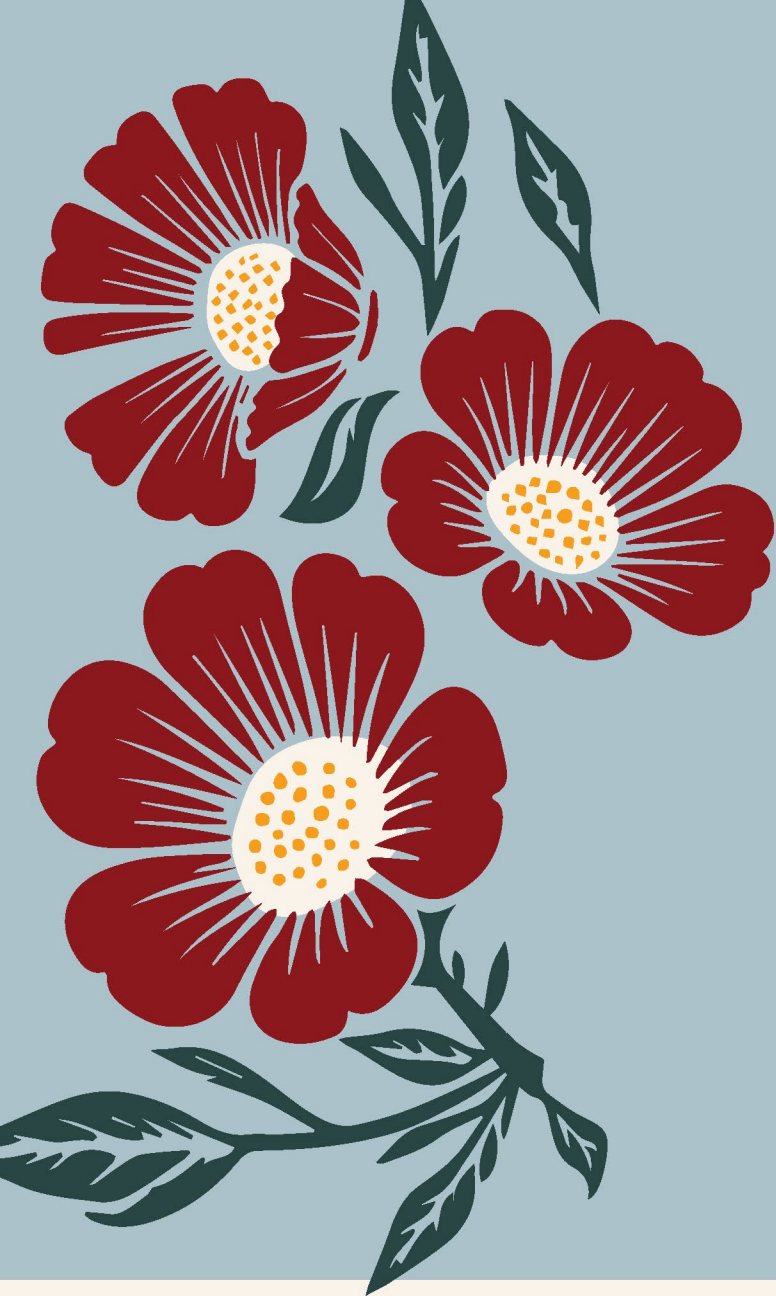
Engine of Impact by William F. Meehan III & Kim Starkey Jonker

- [Metrics & KPIs \(PDF\)](#):

Building a Performance Management System

- [Objectives & Key Results for Nonprofits](#):

Website – Measure What Matters video training series



STRATEGIC PLANNING TEMPLATE



STRATEGIC PLAN TEMPLATE

Advanced Elements with Definitions

MISSION

Defines the fundamental purpose of an organization - why it was created, what it does, and for whom it does it.

Our Mission: [Insert your organization's mission statement here]

VISION

A vision statement describes the future state an organization aspires to create - what the world or community will look like when the organization has successfully fulfilled its mission over time.

Our Vision: [Insert your organization's vision statement here]

VALUES/CULTURE

Values are the fundamental beliefs and principles that guide an organization's decisions, behaviors, and interactions, defining how it will operate and treat people while pursuing its mission

Our Values:

1. [Insert core value #1]
2. [Insert core value #2]
3. [Insert core value #3]

TARGETED IMPACT

Defines the intended outcomes and results an organization aims to achieve, describing how the community or population will be different because of the organization's work.

Our Targeted Impact: [Describe the specific changes you want to create in your community]

THEORY OF CHANGE

A theory of change maps out the cause-and-effect relationships between what an organization does (activities) and the results it expects to achieve, showing the pathway from programs to lasting community change (i.e., impact)

Our Theory of Change:

1

POLL



Q: What have you learned today
about strategic plans?

Q+A

Please raise your hand or add your question in the chat



THANK YOU

We Look Forward to Seeing You at
Our Next Webinar in November!



The recording of this webinar will be posted on
First nations website under “Knowledge Center”



CONTACT

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