



RISING SUN
CENTER FOR OPPORTUNITY

2021-2023+ STRATEGIC PLAN

2024 EXTENSION
Approved 2/28/2024

Guide to the 2024 Extension

What's included

- The full 2021-23 Strategic Plan in its entirety
- Adjustments to some strategies and results to allow the plan to continue to serve as a guide in 2024, such as:
 - Updating dates from 2023 to 2024
 - Updating essential language, such as changing DEI to DEIJ/B
 - Adding essential new activities and results
- A summary of key accomplishments from 2021-23
- Moved the Policy focus area to “What We Do”
- Made Finance its own focus area, separate from Development
- All updates are in green text

What's not included

- A new plan for 2024, or a separate section focused solely on 2024
- Wordsmithing the original plan
- Changes to previous goals or strategies/changes made in hindsight

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Organizational Principles

Vision + Mission

Vision

A just and sustainable future for all people and our planet.

Mission

Building career pathways for economic equity and climate resilience.

Values

Equity	We believe that all individuals and communities should have the respect, opportunities, and material resources necessary to thrive; we strive to produce and sustain racial and gender equity in our programs, policies, and organizational culture
Resilience	We focus on and start with the inherent value and strengths of individuals, communities, and our environment
Transparency	We communicate openly and authentically, actively seek and incorporate feedback, and build in accountability
Diversity, Inclusion, <u>Justice & Belonging</u>	We know that diverse, equitable, just, and inclusive workplaces, where people from all backgrounds experience belonging, are inherently stronger, and that our team and leadership must be both talented and representative of the communities we serve; our commitment to inclusion extends to all aspects of our programs
Learning	We are a learning organization: we seek to continuously improve, demonstrate agility, and are flexible to meet shifting needs while staying true to our mission
Appreciation	We foster a culture of gratitude and acknowledgement; we celebrate our personal and professional successes together and work actively to build each other up

Key Differentiators

Triple Focus	We focus where workforce, climate, and equity converge, with an emphasis on people and communities
Our Communities	We specialize in working alongside youth, women, people of color, people with low or no incomes, and individuals impacted by the justice system
Whole-Person Approach	We collaborate with each person as they set their own goals and choose their own path; we provide integrated services based on individual strengths and needs
Participatory Design	The individuals, communities, partners, and employers we work with participate in designing and improving our programs
High-Road Pathways	We prioritize and advocate for high-road and union careers and pathways that offer family-sustaining wages and benefits and that support a climate-resilient future

Key Results and Achievements, 2021-2023

Diversity, Equity, & Inclusion

Key Results

- **Launched staff-led, compensated DEIJ Committee (2022)**
- **Completed Parts A, B, and C of Rising Sun's first Racial Equity Framework (2023)**
- **Rising Sun governed by a majority (62%) BIPOC Board of Directors (2023)**
- **40% members of Rising Sun's Director Team identify as BIPOC (2023)**
- **88% of staff Strongly Agreed or Agreed that they would recommend Rising Sun for its diverse & inclusive culture (2023)**

Notable Achievements

- **Funded DEIJ work in Rising Sun's annual budget for the first time in 2020; continued and increased through 2023**
- **Worked with a DEIJ consultant to assess Rising Sun's DEIJ culture and practices and make recommendations (2021-22)**
- **Added two new holidays: Juneteenth and Indigenous Peoples' Day (2021, 2022)**
- **Held regular conversations around DEIJ topics; staff participated in trainings, workshops, and cohorts (2021-23)**
- **Created a Hiring Process Manual rooted in anti-bias practices (2022)**
- **Launched BIPOC Affinity Group and White Accountability Group (2022)**
- **Completed Equity in the Center's Racial Equity Pulse Check and developed recommendations (2022)**
- **Added 4 mental health/rest days annually for staff in response to DEIJ assessment and staff feedback (2023)**
- **Worked with a DEIJ consultant to assess HR and evaluation policies and make recommendations (2023)**
- **Disaggregated program outcomes data by race and gender (2023)**
- **Developed HR metrics to track staff hiring, retention, career advancement, and other metrics by race and gender (2023)**
- *See more [here](#)*

Staff Experience

Key Results

- **Created a new role dedicated to HR: Associate Director of Human Resources (2023)**
- **64% of eligible staff enrolled in 403b (2023)**
- **88% of staff Strongly Agreed or Agreed that they would recommend Rising Sun as a place to work (2023)**

Notable Achievements

- **Expanded Rising Sun's flexible remote work policy (2021)**
- **Hired new 403b advisors and introduced a 403 employer match (2021)**
- **Launched a Core Competency Framework for feedback, professional development, and career growth (2021)**
- **Implemented a transparent compensation policy with wage floors and ceilings by career level (2021-22)**
- **Implemented CEO evaluation survey for staff input on CEO performance (2021-23)**
- **Regularly solicited, analyzed, and responded to staff feedback through a Staff Satisfaction Survey with a transparent dashboard (2021-23)**
- **Doubled Family Leave pay to 40% of regular pay for 12 weeks (2022)**
- **Department staff earned SHRM-CP Certificates and HR Investigations Certificate (2022)**
- **Deepened analysis and response to stay & exit interview feedback (2022-23)**
- **Developed a RASCI framework to clarify roles and increase responsibility transparency (2022-23)**
- **Increased staff salaries in response to market comparison; established distinct salary ranges by region (2023)**
- **Added 4 mental health days/year and formalized an annual restorative winter break (2023)**
- **Doubled the professional development budget for each staff (2023)**

Board

Key Results

- **Grew the Board of Directors from 5 members to 13; increased maximum Board size in Bylaws (2021-23)**
- **3 members are program alumni (2023)**
- **62% of Board members identify as BIPOC (2023)**
- **93% of Board members made an annual financial donation to Rising Sun (2023)**

Notable Achievements

- **Opened Board committees to Advisory Council members (2021)**
- **Increased the number of Advisory Council members and leveraged the Advisory Council as a pipeline for Board membership (2021)**
- **Developed an evaluation framework (including staff feedback) and transparent compensation policy for the CEO (2021-22)**
- **Created a Governance Committee (2021-23) and DEIJ Committee (2021-22)**
- **Re-established the Board Finance Committee (2021-23)**
- **Established parameters for the Board's role in Human Resources (2022)**
- **Developed and approved an Operating Reserve Policy and an Investment Policy for Rising Sun (2022-23)**
- **Provided Board governance training (2023)**
- **Developed and implemented a set of Community Agreements for the Board, aligned with Rising Sun's values (2023)**

Youth Programs

Key Results

- **Developed a new program offering to expand climate career exposure and experience for youth: our paid externship program (2021-23)**
- **Piloted free countertop induction stoves for Green House Call customers to advance electrification (2022-23)**
- **Launched a new, virtual Green House Call service to adapt to the pandemic and serve more hard-to-reach customers (2020-23); 69% of Green House Call customers participated virtually (2023)**
- **75% of youth said that their futures were positively impacted by Climate Careers**

Notable Achievements

- **Completed an assessment of emerging household climate needs (2021)**
- **Revised environmental justice curriculum for youth (2021)**
- **Conducted focus groups, surveys, and research with participants and alums to determine needs and where Rising Sun can add value (2021-22)**
- **Piloted free appliance replacements and expanded offerings (2021-23)**
- **Developed a proposal to expand Climate Careers into 31 new rural counties (2021)**
- **Hosted alumni-focused resource events (2022-23)**
- **Piloted new financial coaching and trauma-informed services for youth (2023)**
- **Began strategic growth planning for Climate Careers expansion and its organizational impact (2023)**

Adult Programs

Key Results

- **56% of program participants identified as female or non-binary (2020-23)**
- **84% of placed participants were placed in employment within three months of graduation (2020-23)**
- **100% of participants have access to financial coaching, substance use disorder counseling, and mental health counseling for 12 months post-graduation (2022-23)**
- **Developed formal and informal direct entry agreements with 7 local unions (2022-23)**
- **Piloted a childcare stipend program for parents (2023)**

Notable Achievements

- **Created a resource guide to help participants overcome barriers (2021)**
- **Conducted research on how to build financial security and wealth for program graduates (2021-22)**
- **Contracted with a mental health provider to provide enhanced services (2021-23)**
- **Conducted targeted outreach to funders and policymakers for childcare services and financial support, resulting in a new childcare stipend program (2022-23)**
- **Increased funding for and utilization of supportive services budget (2022-23)**
- **Increased participant stipend during cohort (2022-23)**
- **Expanded relationships with union signatory contractors; expanded employer networking events at the end of each Opportunity Build cohort; hosted first-ever outreach fair (2022-23)**
- **Conducted intentional recruitment/ inreach in prisons, jails, and in the juvenile justice system (2022-23)**
- **Hired a financial coach to provide financial coaching and 1-on-1 support (2022-23)**
- **Awarded a grant to explore pathways to increase diversity in the trades in San Joaquin County (2023)**

Development & Finance

Key Results

- **Developed and maintained a reserve fund equating to 6x our average monthly essential cash expenditures (2022-23)**
- **Increased the average value of grants received from \$63K (2019) to \$72K (2023)**
- **Invested assets achieved a 7% return (2023)**
- **Diversified funding portfolio so that no single source of funding makes up more than 25% of Rising Sun's annual budget (2023)**

Notable Achievements

- **Consistently exceeded fundraising goal; ended four consecutive year in surplus (2019-2022)**
- **Ended PG&E funding (2020); replaced with multi-year funding contracts for multiple years (2020-23)**
- **Switched banking for better terms and values alignment; refinanced commercial building loan (2021)**
- **Secured high-visibility, national grants: Citi Foundation, Bank of America Neighborhood Builders, Justice40 Accelerator (2021-2022)**
- **Created and maintained an annual development plan (2021-23)**
- **Secured >\$1M in COVID relief funding (2021-23)**
- **Expanded the Development team and its capacity (2022)**
- **Completed a third-party assessment of Rising Sun's funding and financial position with strong results (2022)**
- **Upgraded accounting firm; established cash flow tracking (2023)**
- **Distributed assets in ICS accounts to reduce FDIC risk (2023)**
- **Director of Finance and Operations received ECornell Financial Success for Nonprofits Certificate (2023)**
- **Created an Operating Reserve Policy and an Investment Policy Statement (2022) and designated assets; hired an investment management firm with aligned values and invested over 60% of funds (2023)**
- **Developed a financial modeling tool with a third-party consultant (2023)**

Communications

Key Results

- **Increased active contacts by at least 5-10% annually (2021-23)**
- **Increased total number of visits to Rising Sun's website by at least 10-15%, annually (2021-23)**
- **Increased followers and engagement on social media by at least 5-10% annually (2021-23)**
- **Published over 3 positive, Rising Sun-focused pieces per year, plus additional media mentions (2021-23)**
- **Shared more than 8 participant or alumni stories annually across outlets (2021-23)**
- **Installed new signage on Oakland HQ exterior (2022)**
- **Launched a new website to highlight our impact (2023)**

Notable Achievements

- **Communicated our new mission and vision using a change management strategy and tools (2020)**
- **Trained staff on asset-framing (2020-21)**
- **Developed annual PR & Communications plan (2021-23)**
- **Created talking points for staff and board (2021); developed a Messaging Toolkit (2022)**
- **Created b-roll video for new website and other purposes (2022)**
- **Brought back our annual celebration in a re-envisioned format aligned with our values (2023)**
- **Increased social media presence by engaging program staff (2023)**

Policy

Key Results

- **Secured over \$300K annually in dedicated funding for policy (2021-2023)**
- **Hired a Director of Policy (2021-22)**
- **Successfully advocated for high road workforce standards in \$900M of residential building decarbonization programming (2023)**
- **Rising Sun staff and leadership invited to speak on an expert panel at least once per quarter (2021-2023)**

Notable Achievements

- **Developed workforce and training standards, including a wage floor, for the statewide Solar on Multifamily Affordable Housing (SOMAH) program; developed and facilitated SOMAH's Job Training Organization Taskforce (2021-22)**
- **Served as a member of the CA Green New Deal Coalition Steering Committee (2021); participated as a member (2022-23)**
- **Created and led a High Road Training Partnership (H RTP) focused on improving job quality in residential decarbonization; awarded 3 rounds of funding (2021-23)**
- **CEO appointed to the CA Disadvantaged Communities Advisory Group (2022-23)**
- **CEO named to the City of Oakland's Community Workforce Agreement (CWA) Taskforce (2022)**
- **Staff advocated for SB 1115, creating a state department focused on women in the trades (2022)**
- **Hired consultants to develop a policy landscape assessment and proposed structure for Rising Sun's policy work (2023)**

Where we said we'd be by 2023

Topic Area	Key Changes
Mission, Vision, Values	Shift focus away from environmental and economic sustainability and towards economic equity and climate resilience; support an antiracist culture, programs, and practices aligned with our core values - YES!
Climate	Shift from a primary focus on reducing emissions through residential energy efficiency to building individual and community resilience to the impacts of climate change - YES!
Geography	Preserve and grow presence and services in Stockton and San Joaquin County - YES!
Priority Communities	Deepen expertise in working alongside women, returning citizens/individuals in reentry, and opportunity youth - YES!
Alumni Engagement	Expand alumni engagement via our Advisory Board, Board of Directors, mentorship opportunities, and relevant programming, training, and resources - YES!
Youth Services	Extend services for and engagement with youth participants beyond summer employment - YES!
Industries	Prepare and enable both adult and youth participants to thrive in high-road pathways within and beyond the building trades - YES!
Policy Impact	Secure dedicated funding for policy work and hire a dedicated Director of Policy - YES!
Funding	Diversify funding and fill gaps through high-value, mission-aligned, strategic contracts and grants and by increasing major individual and corporate giving; develop a multi-year funding strategy and goals - YES!
Team	Build a more diverse and inclusive staff, leadership, and Board; offer flexible work options to improve retention - YES!
Enabling Capabilities	Develop risk management capability and practice , actively manage to key results, implement annual succession planning , build and maintain strong governance practices, and effectively steward our financial assets - Partial

Top Strategies and Results, 2021-2024

Who We Are

Focus Area	Objective	Key Results
Diversity, Equity, Inclusion, Justice, & Belonging	Embody a diverse, equitable, inclusive, just and antiracist work environment through our policies, processes, and program design, where staff, Board, and participants experience belonging, with metrics for accountability.	<ul style="list-style-type: none">● Racial Equity Framework developed● At least 50% Black, Indigenous, and/or persons of color are members of the staff leadership team by the end of 2024● 100% of employees would recommend Rising Sun for its diverse and inclusive culture
Staff Experience	Provide a work environment and experience that people want to be part of and grow with.	<ul style="list-style-type: none">● Median employee tenure increased from 3 years to 4 years● 90% of staff would recommend Rising Sun as a place to work● Inclusion, diversity, and representation at all levels of the organization, including leadership, achieved and maintained
Board	Cultivate an effective, committed, and engaged Board of Directors that reflects and upholds our values, employs best practices in nonprofit governance, and maximizes Rising Sun's impact.	<ul style="list-style-type: none">● Board of at least 14 actively engaged members built and maintained● Governance Committee established● 100% of Board members contribute financially to Rising Sun (every Board member gives what they can)

What We Do

Focus Area	Objectives	Key Results
Youth Programs	Reimagine our social enterprise model to better prepare youth for the world of work while increasing community climate resilience in the Bay Area and the Central Valley.	<ul style="list-style-type: none">• 100% of participants come from low-income households• Contract for Central Valley program expansion secured• New Green House Call service that helps customers take the first step on their electrification journey launched by 2024• New offerings that reconnect youth to work and/or school developed
Adult Programs	Continue to grow and improve the training and supportive services offered for adult participants and alumni, with an increased focus on women and individuals impacted by the justice system, opportunities with high-road employers and unions, and supporting long-term economic resilience.	<ul style="list-style-type: none">• 75% of program participants identify as women by 2024• 50% of program enrollees have been impacted by the justice system by 2024• 80% of employed graduates/alumni have a checking and savings account by 2024• 70% of program participants graduate into high road careers, training, or education annually, including with one new project, employer, or contractor that focuses on climate resilience
Policy	Advance both Rising Sun's on-the-ground work with individuals and our mission at the intersection of economic equity and climate resilience at the state and systems-level through policy and advocacy work.	<ul style="list-style-type: none">• Dedicated resources for policy secured by 2023, including a director-level policy role and \$400K in annual funding• Building decarbonization jobs meet the definition of "high-road"

How We Do It

Focus Area	Objectives	Key Results
Development	Improve Rising Sun's financial sustainability, flexibility, and program impact by further diversifying our funding portfolio while practicing community-centric fundraising principles.	<ul style="list-style-type: none">• No single source of funding makes up more than 25% of Rising Sun's annual budget
Communications	Share Rising Sun's story and impact in a manner that inspires and lifts up others, and that elevates our profile, encourages interest in our programs, advances our policy agenda, and supports our financial goals.	<ul style="list-style-type: none">• Staff invited to present at least 10 times per year at events, panel discussions, and conferences• Engagement on social media increased by at least 5-10% annually, as measured via Hootsuite and/or the individual platforms• At least 3 positive, Rising Sun-focused pieces published per year, plus additional media mentions
Finance	Ensure Rising Sun's long-term financial health by implementing best practices in financial management; prepare for and support responsible, sustainable growth.	<ul style="list-style-type: none">• Reserve fund maintained equating to 6x our average monthly essential cash expenditures• Portion of assets achieve at least 5% return

Focus Areas, 2021-2024

Who We Are:
DEIJ/B,
Staff Experience, &
Board

Focus Area: Diversity, Equity, Inclusion, Justice, & Belonging (DEIJ/B)

Objective

Embody a diverse, equitable, inclusive, just and antiracist work environment through our policies, processes, and program design, where staff, Board, and participants experience belonging, with metrics for accountability.

Strategies

- **Develop an ongoing DEIJ and antiracism practice and operationalize equity in Rising Sun's policies and processes**
- **Leverage data to track and improve DEIJ**
- **Cultivate an inclusive and representative organizational culture for and among staff, participants, alumni, community members, and our Board**

Diversity, Equity, Inclusion, & Justice (1 of 2)

Strategy	Key Activities	Top Results
Develop an ongoing DEIJ and antiracism practice and operationalize equity in Rising Sun's policies and processes	<ul style="list-style-type: none">● Hire a DEIJ consultant and/or form a DEIJ committee to assess current state and establish needs and goals● Develop a comprehensive DEIJ program and/or practice that mitigates unconscious and conscious biases in our policies and processes and that supports inclusion and antiracism● Develop, implement, and share a Racial Equity Framework for Rising Sun● Update policies, practices, processes as needed	<ul style="list-style-type: none">● Ongoing, comprehensive DEIJ and antiracism program/practice implemented● Racial Equity Framework developed
Leverage data to track and improve DEIJ	<ul style="list-style-type: none">● Measure job satisfaction and employee retention by race, function, level, and/or team● Track job applications and hires by race, function, level, and/or team● Identify other key areas to track; establish baselines, set goals, and measure progress	<ul style="list-style-type: none">● Set of metrics and data to track and improve DEIJ established and maintained

Diversity, Equity, Inclusion, & Justice (2 of 2)

Strategy	Key Activities	Top Results
<p>Cultivate an inclusive and representative organizational culture for and among staff, participants, alumni, community members, and our Board</p>	<ul style="list-style-type: none">• Engage staff and leadership to co-design DEIJ initiatives• Facilitate activities (e.g., workshops, trainings, readings, etc.) to build a culture of inclusion• Continue to analyze race and other demographic data within programs (participants and customers served)• Closely engage with the individuals and communities we work with to ensure our programs reflect their evolving needs• Increase the engagement and connection between program participants and overall Rising Sun staff• Solicit ongoing feedback from staff, Board, participants on Rising Sun's org culture and DEIJ efforts• Build a diverse pipeline of individuals from various racial backgrounds for board and leadership positions, supported by Succession Planning• Offer biannual workshops/trainings around DEIJ for staff	<ul style="list-style-type: none">• At least 50% Black, Indigenous, and/or persons of color are members of the staff leadership team by the end of 2024• 100% of employees would recommend Rising Sun for its diverse and inclusive culture

Focus Area: Staff Experience

Objective

Provide a work environment and experience that people want to be part of and grow with.

Strategies

- **Increase Human Resources capacity in areas such as compliance, employment law, training and development, recruiting/hiring/ onboarding, benefits analysis, disciplinary action, and policy development**
- **Support employee satisfaction and retention by implementing policies based on industry best practices and staff feedback**
- **Develop and implement strategies and tools to prepare the organization for sustainable growth**
- **Provide opportunities for staff to provide feedback and to grow professionally**
- **Operationalize an equitable staff recruitment process to attract and hire new and diverse talent**
- **Build an annual succession planning practice as both a risk management and a diversity, equity, and inclusion strategy**

Staff Experience (1 of 3)

Strategy	Key Activities	Top Results
<p>Increase Human Resources capacity in areas such as compliance, employment law, training and development, recruiting/hiring/onboarding, benefits analysis, disciplinary action, and policy development</p>	<ul style="list-style-type: none"> ● Options: <ul style="list-style-type: none"> ○ Upskill existing staff ○ Hire additional staff ○ Hire firm ○ Seek pro-bono support 	<ul style="list-style-type: none"> ● Individual or entity with primary responsibility for Human Resources identified
<p>Support employee satisfaction and retention by implementing policies based on industry best practices and staff feedback</p>	<ul style="list-style-type: none"> ● Expand remote work policy ● Provide income transparency by salary band and career level ● Roll out 403b matching plan ● Regularly evaluate our compensation and benefits package to ensure industry competitiveness ● Increase compensation transparency 	<ul style="list-style-type: none"> ● Median employee tenure increased from 3 years to 4 years ● 90% of staff would recommend Rising Sun as a place to work ● 60% of staff are enrolled in 403b plan
<p>Develop and implement strategies and tools to prepare the organization for sustainable growth</p>	<ul style="list-style-type: none"> ● Complete a comprehensive Workforce Analysis (supply, demand, gaps) ● Identify opportunities and tools to streamline and standardize hiring and recruitment ● Implement effective, consistent change management communications plan 	<ul style="list-style-type: none"> ● Minimal changes to staff retention levels during growth ● Staff satisfaction maintained during growth

Staff Experience (2 of 3)

Strategy	Key Activities	Top Results
<p>Provide opportunities for staff to provide feedback and to grow professionally</p>	<ul style="list-style-type: none">● Improve and adapt the Core Competency framework as a mechanism for feedback, professional development, and career growth● Provide personalized and org-wide professional development opportunities for all staff, including through collaboration and knowledge-sharing across teams● Explore 360 degree feedback tool and process● Continue Stay and Exit Interviews● Offer standardized training and support for supervisors	<ul style="list-style-type: none">● 90% of staff increase their proficiency in at least two competency areas in the Core Competency Framework each year
<p>Operationalize an equitable staff recruitment process to attract, hire, and retain new and diverse talent</p>	<ul style="list-style-type: none">● Adopt and formalize previously developed best practice recruitment materials and processes and update to eliminate bias● Recruit highly-talented candidates representative of the communities we serve● Continue internal hire process that includes program alums	<ul style="list-style-type: none">● Inclusion, diversity, and representation at all levels of the organization, including leadership, achieved and maintained● Average time-to-fill of 42 days for open positions achieved

Staff Experience (3 of 3)

Strategy	Key Activities	Top Results
<p>Build an annual succession planning practice as both a risk management and a diversity, equity, and inclusion strategy</p>	<ul style="list-style-type: none">• Create and annually update a Succession Plan (for key staff and Board) that includes emergency succession, departure-defined succession, and strategic leadership development across the organization• Utilize a distributed leadership model that supports internal leadership development, consensus-based decision-making, and inclusion of diverse perspectives• Identify vertical and lateral pathways within Rising Sun, including for staff, alumni, Advisory Board, and Board of Directors• Engage Rising Sun's Board of Directors in annual succession planning	<ul style="list-style-type: none">• Succession Plan (or "Pathway Plan") developed and updated annually

Focus Area: Board of Directors

Objective

Cultivate an effective, committed, and engaged Board of Directors that reflects and upholds our values, employs best practices in nonprofit governance, and maximizes Rising Sun's impact.

Strategies

- **Increase capacity of Rising Sun's Board of Directors**
- **Enhance Board governance**
- **Mobilize ambassadors, champions, and fundraisers for Rising Sun**
- **Cultivate an engaged Advisory Board**

Board of Directors (1 of 2)

Strategy	Key Activities	Top Results
Increase capacity of Rising Sun's Board of Directors	<ul style="list-style-type: none">● Increase number of Board members, filling gaps in finance, union representation, program alumni, and fundraising● Support a constructive partnership with the CEO● Foster a culture of community and collaboration among Board members● Offer opportunities for interaction between Board, staff, and participants/alumni through Board attendance at Rising Sun events, staff participation in Board mtgs, Board-staff working groups/committees, etc.	<ul style="list-style-type: none">● Board of at least 14 actively engaged members built and maintained● 90% of board members renew for a 2nd term● 100% of Board members complete and fulfill an annual contract● At least 1 alum from each program has a seat on the Board

Board of Directors (2 of 2)

Strategy	Key Activities	Top Results
<p>Enhance Board governance</p>	<ul style="list-style-type: none"> ● Re-establish and staff Board Committees ● Establish a Governance Committee to determine Board membership/nominations and to evaluate overall and individual Board member performance, including Board member self-assessments. ● Develop and implement a more formal evaluation process for the CEO that includes staff input 	<ul style="list-style-type: none"> ● Governance Committee established ● Board self-evaluation process implemented ● 100% of Board members complete self-assessment ● Annual eval of the CEO conducted by the Board
<p>Mobilize ambassadors, champions, and fundraisers for Rising Sun</p>	<ul style="list-style-type: none"> ● Equip and engage Board and Advisory Board members to build external partnerships, increase Rising Sun's visibility with key stakeholders, and/or cultivate new donors ● Maintain and nurture relationships with Board alumni 	<ul style="list-style-type: none"> ● 100% of Board members contribute financially to Rising Sun (every Board member gives what they can)
<p>Cultivate an engaged Advisory Council</p>	<ul style="list-style-type: none"> ● Increase number of active Advisory Council members including program alumni ● Leverage the Advisory Council as a pipeline for Board membership ● Open Board committees to Advisory Council members 	<ul style="list-style-type: none"> ● 100% of Advisory Council members contribute to Rising Sun with connections, expertise, and/or funding

What We Do: Youth Programs, Adult Programs, and Policy

Focus Area: Youth Programs

Objective

Reimagine our social enterprise model to better prepare youth for the world of work while increasing community climate resilience in the Bay Area and the Central Valley.

Strategies

- Continue to prioritize youth jobseekers from low-income households while increasing our capacity to work with opportunity youth
- Work with community partners in Stockton and the Central Valley to develop and implement programs and services that specifically address local needs
- Adapt our social enterprise model to offer expanded residential services that support community climate resilience throughout our service territory
- Increase youth development, workforce development, and supportive services offered to youth participants as part of the Climate Careers program

Youth Programs (1 of 2)

Strategy	Key Activities	Top Results
<p>Continue to prioritize youth jobseekers from low-income households while increasing our capacity to work with opportunity youth</p>	<ul style="list-style-type: none"> • Hire 100% low income youth, with an emphasis on gender inclusion • Increase number of opportunity youth served through targeted recruitment • Explore solutions to address the Energy Specialist driver gap 	<ul style="list-style-type: none"> • 100% of participants come from low-income households • 50% of youth participants are female or nonbinary by 2024
<p>Work with community partners in Stockton and the Central Valley to develop and implement programs and services that specifically address local needs</p>	<ul style="list-style-type: none"> • Partner with Rise Stockton to implement the Transformative Climate Communities (TCC) program and scope, both for Climate Careers and as the project's workforce development consultant • As part of TCC: <ul style="list-style-type: none"> ○ Offer additional career exploration opportunities and professional readiness training to youth participants ○ Create partnerships with local employers for youth placement opportunities ○ Work with local vendors to offer appliance replacement to Green House Call customers • Identify additional opportunities for Rising Sun to provide new or expanded mission-aligned services in Stockton and the Central Valley • Prepare for sustainable growth and expansion; build capacity 	<ul style="list-style-type: none"> • 45 youth in San Joaquin County connected to opportunities within and beyond Climate Careers by 2023 • 40% of Stockton Green House Call recipients have participated in TCC appliance replacements by 2023 • Contract for Central Valley program expansion secured

Youth Programs (2 of 2)

Strategy	Key Activities	Top Results
<p>Adapt our social enterprise model to offer expanded residential services that support community climate resilience throughout our service territory</p>	<ul style="list-style-type: none"> • Continue to target outreach to priority communities, including low-income, underserved, hard-to-reach households • Rethink and improve offerings to better meet emerging needs, including building electrification and household climate resilience (heat mitigation, wildfire, etc.) • Offer year-round, digital tools to support client engagement and community climate resilience and to increase program time spent on youth development 	<ul style="list-style-type: none"> • New Green House Call service that helps customers take the first step on their electrification journey launched by 2024 • 50% of all residential engagement occurs through our digital toolkit by 2024
<p>Increase youth development, workforce development, and supportive services offered to youth participants as part of the Climate Careers program</p>	<ul style="list-style-type: none"> • Develop new tailored services and resources for opportunity youth • Conduct focus groups, surveys, and research with participants and alums to determine needs and where Rising Sun can add value • Leverage learning from TCC to build out services • Design and implement new program elements, including supportive services, coaching/mentorship, career exposure, financial literacy, and connections with education, training, internships, or jobs, with an emphasis on high-road pathways for participants and alums 	<ul style="list-style-type: none"> • New offerings that reconnect youth to work and/or school developed • System to engage with youth post-program and track individual outcomes at 1, 2, and 3 years developed by 2024

Focus Area: Adult Programs

Objective

Continue to grow and improve the training and supportive services offered for adult participants and alumni, with an increased focus on women and individuals impacted by the justice system, opportunities with high-road employers and unions, and supporting long-term economic resilience.

Strategies

- Deepen focus on women and individuals impacted by the justice system to increase the number of women in the trades and serve populations overcoming high barriers to employment
- Improve financial and asset-building curriculum and services to support long-term success
- Connect participants with quality, high-road opportunities in union apprenticeship and in careers that support climate resilience
- Identify gaps in our current suite of supportive services and work to fill them

Adult Programs (1 of 2)

Strategy	Key Activities	Top Results
<p>Deepen focus on women and individuals impacted by the justice system to increase the number of women in the trades and serve populations overcoming high barriers to employment</p>	<ul style="list-style-type: none">• Focused recruitment of women• Intentional recruitment/inreach in prisons and jails, and with juvenile justice• Work with building trades affiliates to develop direct entry agreements that prioritize women and re-entry individuals• Provide tailored supportive services and resources for women and re-entry individuals• Engage women and re-entry program alumni as guest speakers, ambassadors, and mentors	<ul style="list-style-type: none">• 75% of program participants identify as women by 2024• 50% of program enrollees have been impacted by the justice system by 2024• 5 new direct entry agreements established by 2024
<p>Improve financial and asset-building curriculum and services to support long-term success</p>	<ul style="list-style-type: none">• Hire a financial coach and offer resources on credit repair, banking, asset-building, and personal finance for participants and alumni• Identify additional services/resources to support long-term economic prosperity• Measure long-term economic impact of program on its graduates	<ul style="list-style-type: none">• 80% of employed graduates/alumni have a checking and savings account by 2024• 100% of participants have access to financial coaching for 12 months post-graduation

Adult Programs (2 of 2)

Strategy	Key Activities	Top Results
<p>Connect participants with quality, high-road opportunities in union apprenticeship and in careers that support climate resilience</p>	<ul style="list-style-type: none">• Work with union signatory contractors to ensure programming remains relevant to emerging high-road careers and skills• Expand existing and create new partnerships with union contractors and high-road employers• Deepen union relationships• Enhance climate-relevant curriculum, including training on electrification and decarbonization• Explore opportunities to expand the geographic reach of Opportunity Build's model• Increase emphasis on retention and career advancement	<ul style="list-style-type: none">• 70% of program participants graduate into high road careers, training, or education annually, including with one new project, employer, or contractor that focuses on climate resilience• HPWH training piloted
<p>Identify gaps in our current suite of supportive services and work to fill them</p>	<ul style="list-style-type: none">• Conduct a gap analysis of existing services, partnering with participants and alumni to identify needs• Build/expand relationships and referral networks with agencies that address major barriers to employment• Conduct targeted outreach to funders for specific support services (e.g., childcare fund)• Create and maintain a resource guide for barrier removal• Engage alumni in upskilling opportunities and ongoing supportive services• Pilot additional resources for childcare support, including stipends	<ul style="list-style-type: none">• At least 2 new supportive services resources added each year to address main focus areas (e.g., homelessness, food insecurity, transportation, childcare, substance abuse and mental health support)• Childcare stipend program launched

Focus Area: Policy

Objective

Advance both Rising Sun's on-the-ground work with individuals and our mission at the intersection of economic equity and climate resilience at the state and systems-level through policy and advocacy work.

Strategies

- **Grow Rising Sun's policy capacity and capability**
- **Proactively provide an on-the-ground workforce development perspective on issues at the intersection of our mission**
- **Establish Rising Sun as a high-road workforce development expert for policy and decision-makers**

Policy (1 of 2)

Strategy	Key Activities	Top Results
<p>Grow Rising Sun's policy capacity and capability</p>	<ul style="list-style-type: none"> ● Review and refine Rising Sun's Policy Principles ● Obtain dedicated funding for policy work ● Hire a director-level policy role ● Explore opportunities/evaluate interest in engaging staff, program participants, and alumni in advocacy work; increase bidirectional understanding of policy/program work internally ● Amplify impact through coalitions and collaboration ● Determine Rising Sun's policy role, strategy, and structure 	<ul style="list-style-type: none"> ● Dedicated resources for policy secured by 2023, including a director-level policy role and \$400K in annual funding
<p>Proactively provide an on-the-ground workforce development perspective on issues at the intersection of our mission</p>	<ul style="list-style-type: none"> ● Advocate for accessible high-road jobs: careers that offer living wages, benefits, and advancement ● Focus efforts at state-level policies, guidelines, and regulations addressing economic equity and climate resilience ● Support California's just transition to a clean economy ● Ensure climate investments are delivered equitably to priority communities ● Accelerate equitable electrification ● Consult on workforce development and standards ● Identify and lift up additional policies and programs that provide opportunities for Rising Sun's program participants, including PLAs and CWAs ● Lead a High Road Training Partnership that sets and advocates high road workforce standards for accessible residential decarb careers 	<ul style="list-style-type: none"> ● State climate investments prioritize accessible, quality jobs and fund high-road workforce development ● Building decarbonization jobs meet the definition of "high-road"

Policy (2 of 2)

Strategy	Key Activities	Top Results
<p>Establish Rising Sun as a high-road workforce development expert for policy and decision-makers</p>	<ul style="list-style-type: none">● Identify and nurture relationships with with key partners, including advocacy groups, grassroots organizers, and community-based organizations● Develop strong relationships with elected officials● Develop strong relationships with agency staff and officials - CA Workforce Development Board, CA Strategic Growth Council, California Public Utilities Commission, California Energy Commission, and others● Connect Rising Sun's work to broader social change movements, such as the Green New Deal● Listen, learn, and research to stay on top of industry trends as well as participant and community needs● Track legislation Rising Sun supports/comments on	<ul style="list-style-type: none">● Rising Sun staff invited to speak on an expert panel at least once per quarter● At least 3 staff members or program alums actively sit on committees convened by government or community organizations by 2024, including the CA Disadvantaged Communities Advisory Group

How We Do It: Development, Communications, & Finance

Focus Area: Development

Objective

Improve Rising Sun's financial sustainability, flexibility, and program impact by further diversifying our funding portfolio while practicing community-centric fundraising principles.

Strategies

- Diversify our funding and support our mission through new and existing strategic partnerships with government agencies, mission-aligned corporations, and philanthropic organizations
- Develop and implement a **development plan and strategy** aligned with Community-Centric Fundraising principles
- Enhance Rising Sun's funding and development capability

Development (1 of 2)

Strategy	Key Activities	Top Results
<p>Diversify our funding and support our mission through new and existing strategic partnerships with government agencies, mission-aligned companies, and philanthropic organizations</p>	<ul style="list-style-type: none">● Proactively pursue and influence emerging funding opportunities aligned with our vision● Provide on-the-ground insights and advocacy related to our intersectional mission● Build strategic partnerships with large companies and foundations aligned with our mission● Increase funds raised through corporate matching; develop sponsorship strategy and increase sponsorship opportunities● Focus on high-value opportunities● Actively pursue mission-aligned sources of enterprise capital● Increase the number of multi-year funders● Secure new prospects to ensure the financial sustainability of the Opportunity Build program	<ul style="list-style-type: none">● No single source of funding makes up more than 25% of Rising Sun's annual budget● At least \$15M in sustainable annual revenue identified to support work in San Joaquin County beyond TCC● Average value of grants received increased from \$63K (2019) to \$80K (2024)

Development (2 of 2)

Strategy	Key Activities	Top Results
Develop and implement development plan and strategy aligned with Community-Centric Fundraising principles	<ul style="list-style-type: none">● Steward and celebrate donors at all levels; provide opportunities for people to give both time and/or money; customize stewardship● Actively engage individual donors in our work and mission through site visits, updates, storytelling, and other methods● Increase the number of individual donors at all giving levels; increase the number of donors who give monthly	<ul style="list-style-type: none">● Donor retention rate aligns with industry standard (45%) by 2024● Host annual celebration of Rising Sun's programs and partners
Enhance Rising Sun's funding and development capability	<ul style="list-style-type: none">● Establish longer-term fundraising target and strategy (i.e., 3-year vs. annual)● Deepen fundraising culture throughout the organization, supporting staff, alumni, and Board as Rising Sun champions● Improve storytelling to better communicate our impact● Create at least two digital fundraising campaigns each year,, focusing on our impact and a call to action through financial support	<ul style="list-style-type: none">● 3-year fundraising target established● 75% of staff participate in fundraising events/campaigns (sharing with networks, soliciting donations, etc.)

Focus Area: Communications

Objective

Share Rising Sun's story and impact in a manner that inspires and lifts up others, and that elevates our profile, encourages interest in our programs, advances our policy agenda, and supports our financial goals.

Strategies

- **Position Rising Sun programs as a model for equitable, high-road workforce development, with staff expertise in economic equity and climate resilience**
- **Manage social and earned media presence to increase engagement**
- **Improve storytelling to better communicate our impact**
- **Utilize Oakland HQ as a highly visible community resource that communicates our mission and values**

Communications (1 of 3)

Strategy	Key Activities	Top Results
<p>Position Rising Sun programs as a model for equitable, high-road workforce development, with staff expertise in economic equity and climate resilience</p>	<ul style="list-style-type: none">• Communicate our new mission and vision using a change management strategy and tools• Develop PR & Communications plan• Develop a Messaging Toolkit• Enable staff to become ambassadors and share their knowledge and expertise with the broader public• Highlight individual staff members and their expertise in newsletters and other outlets• Offer thought leadership in workforce development for quality jobs and access• Highlight Rising Sun as an high-quality nonprofit employer• Begin to develop knowledge of and communications presence in Central Valley communities; consider changes in strategy for more rural communities	<ul style="list-style-type: none">• Staff invited to present at least 10 times per year at events, panel discussions, and conferences• Rising Sun's active contacts increased by at least 5-10% annually• Total number of visits to Rising Sun's website increased by at least 10-15%, annually, as measured via Google Analytics and Monster Insights• At least 3 blog posts or newsletter articles written by non-Communications staff each year

Communications (2 of 3)

Strategy	Key Activities	Top Results
<p>Manage social and earned media presence to increase engagement</p>	<ul style="list-style-type: none">• Manage digital content promoting Rising Sun's mission, work, and perspective on key topics, and actively engage with Rising Sun's followers digitally• Update and develop Rising Sun's media contact list (print, radio, television, blogs podcasts, etc.) and migrate media list to Salesforce:• Develop relationships with at least 3 new reporters each year• Host one to three media events per year (either media-specific, such as tiny home dedication, or invite media to cover existing events)• Conduct quarterly communications analyses to measure progress against goals	<ul style="list-style-type: none">• Followers on social media increased by at least 5-10% annually, as measured via Hootsuite and/or the individual platforms• Engagement on social media increased by at least 5-10% annually, as measured via Hootsuite and/or the individual platforms• At least 3 positive, Rising Sun-focused pieces published per year, plus additional media mentions

Communications (3 of 3)

Strategy	Key Activities	Top Results
Improve storytelling to better communicate our impact	<ul style="list-style-type: none">● Incorporate impact data into communications● Tie programs and impact to broader societal issues● Enable participants, staff, Board members, and alumni to comfortably share and lift up their stories● Develop new communication channels, such as videos● Develop updated language reflecting Climate Careers' evolution● Ensure that all aspects of our mission, and their intersection, are represented in communications, including climate	<ul style="list-style-type: none">● At least 8 participant or alumni stories shared annually across Rising Sun's digital channels, earned media, and reports● At least one-two professional, extended videos and 12-24 social-quality, short videos produced each year
Utilize Oakland HQ as a highly visible community resource that communicates our mission and values	<ul style="list-style-type: none">● Improve building signage to clearly communicate what we do, without requiring a visit to our website● Explore opportunities to power our buildings using renewable sources● Maintain brand consistency on and within our building	<ul style="list-style-type: none">● New signage installed on Oakland HQ exterior

Focus Area: Finance

Objective

Ensure Rising Sun's long-term financial health by implementing best practices in financial management; prepare for and support responsible, sustainable growth.

Strategies

- **Implement industry best practices to optimize our finances, mitigate risk, ensure sustainability, and increase impact**
- **Increase sophistication and impact of Rising Sun's financial tools and products**
- **Assess, track, and forecast Rising Sun's financial health**

Finance

Strategy	Key Activities	Top Results
<p>Implement industry best practices to optimize our finances, mitigate risk, ensure sustainability, and increase impact</p>	<ul style="list-style-type: none"> ● Look for opportunities to bank with companies whose values align with ours ● Maximize our building space as a financial asset; explore refinancing options ● Maintain and build our cash reserve ● Distribute and diversify our financial assets to minimize risk ● Invest in financial training for staff/leadership as needed ● Engage the Board's Finance Committee on all strategies 	<ul style="list-style-type: none"> ● Reserve fund maintained equating to 6x our average monthly essential cash expenditures
<p>Increase sophistication and impact of Rising Sun's financial tools and products</p>	<ul style="list-style-type: none"> ● Develop a Board-approved Investment Policy Statement ● Engage in values-aligned impact investing to optimize return on assets and surplus amounts, to be reinvested in programs ● Improve budget and budget accuracy ● Expand staff and Board financial capabilities and expertise ● Dedicate more staff resources to finance 	<ul style="list-style-type: none"> ● Portion of assets achieve at least 5% return
<p>Assess, track, and forecast Rising Sun's financial health</p>	<ul style="list-style-type: none"> ● Complete a third party financial assessment ● Establish a quarterly cash flow forecast ● Develop a financial modeling tool and practice 	<ul style="list-style-type: none"> ● Rising Sun assessed to be in strong financial health ● Financial modeling tool developed



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