



2025-2030

STRATEGIC PLAN

LOCAL ROOTS, STATEWIDE IMPACT

OUR MISSION

SOCM is a 51-year-old, member-led organization dedicated to empowering Tennesseans in their efforts to have a greater voice in determining their own future. We accomplish this by training local leaders and by developing and sustaining long-term, democratically run, and locally rooted membership organizations in communities throughout Tennessee. Together, SOCM members work towards a Tennessee where all people are treated with dignity, where our environment is preserved and protected, and where corporations and public officials are held accountable to the needs of the people.

OUR VALUES

- We believe that extraordinary change is rooted in the power of ordinary people.
- We believe that progress in our communities should center on the common good and not on the profit of a few.
- We believe that decision-making power should not be dependent on social status or personal wealth.
- We believe that those who engage in enterprise, commerce, and industry should be accountable to the communities in which they operate, as should politicians and government officials.
- We believe that movement towards social, economic, and environmental justice must involve building solidarity across lines of age, race, gender, sexual orientation, income, and party politics.
- We believe in an approach to organizing grounded in listening to our neighbors, identifying deeply and widely felt issues, developing an analysis of power, and creating campaigns to address issues together.
- We believe that effective organizing is learned and refined through training, peer mentorship, experience, practice and reflection with our neighbors.
- We acknowledge our interdependence and interconnectedness and therefore take shared responsibility for inspiring growth and change for the common good.



WHY A 5-YEAR PLAN?




Background:

In 2021, the SOCM board determined that a short term (2-3 year) plan was needed to reestablish organizational stability as we emerged from COVID, re-staffing and other organizational challenges. Since 2021, we have regained a high degree of financial stability, made major strides in member recruitment and development, begun to address challenges in organization infrastructure, and have bolstered local and cross-chapter issue campaigns. In 2023, the board determined that we were on solid enough footing to begin work on a longer range strategic plan.

Throughout the formation of this plan, there were a couple recurring questions that provided us with direction and grounding:

How do we stay rooted in local work in a way that helps us build power towards our collective statewide vision? SOCM's theory of change is grounded in collective thinking and action focused on the material issues that impact ourselves and our neighbors. This means we always have a firm foot in local level work. However, in every community, there are hundreds if not thousands of worthwhile issues we **could** focus on. Part of the function of this strategic plan is to establish some framing that can help us focus in on local priorities that **also** strengthen our ability to impact the larger multi-county and statewide vision outlined in our mission statement. We have to get specific and strategic about which campaigns we take on.

WHO is our base and WHY? SOCM cannot be everything to everyone. As we think about our goals and our capacity, we also have to get specific about **who** in our communities we need to intentionally reach out to, build with, and work alongside to win what we say we want to win. At our staff and board retreat, we reiterated that SOCM's primary focus is building **multi-racial, working class power with people in rural and suburban counties**. We also noted that we need to build meaningful coalition with black- and brown-led organizations whose goals and strategies align with our own. How we do this needs to be an ongoing point of reflection within our chapters, campaign committees, and board.



What's in the Strategic Plan?

Strategic planning provides a roadmap for the day-to-day work of staff, board and members. While plans WILL shift and change based on many unknown factors, we must set a vision for where we're hoping to get. This plan will help guide our collective work and will be refined and shaped by members over the course of the next 5 years. The plan includes two main sections:

1. **Strategic Issue Campaigns** - We have identified specific issue campaigns where we have existing movement and a strong potential to galvanize around a vision for statewide power building over the next 5 years.
2. **Organization-Building** - In this section, we establish a set of clear, 5-year goals related to how we will build SOCM as an organization to meet our strategic campaign goals. We have developed goals in the following categories: organizational infrastructure, fundraising, member recruitment, and leadership development.

Our process:

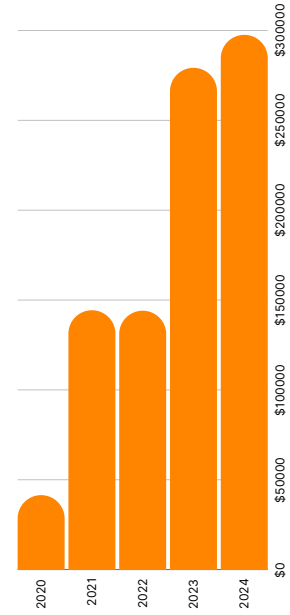
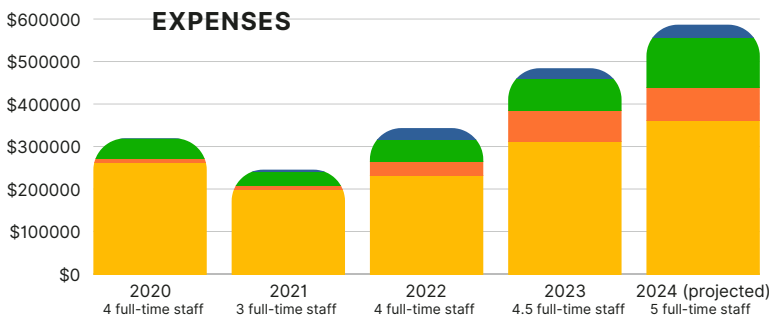
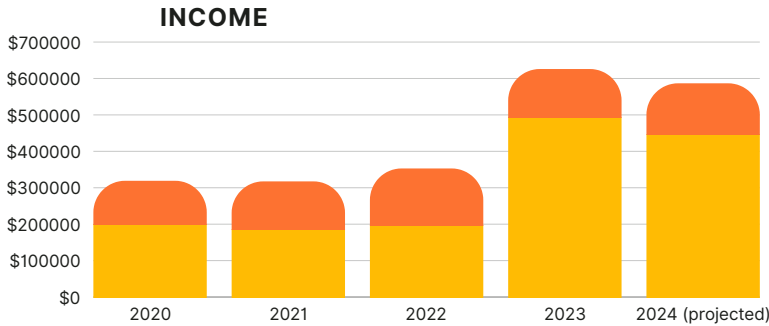
How the board, staff, and membership developed this plan

1. **MEMBER INPUT** - Before establishing goals, the executive director and board took time to hear from SOCM members to allow them to identify specific challenges and hopes related to our shared work. The board and staff solicited member input through 1:1 conversations, chapter and committee level discussions, and online surveys over the course of 8 months.
2. **ESTABLISH CORE GOALS** - In the Spring of 2024, the board and staff held a retreat to establish 3-5 core goals in each of the following areas:
 - a. Organizational infrastructure
 - b. Fundraising
 - c. Member recruitment and leadership development
 - d. Issue committee and campaign development (first draft outlined by staff and committee leaders)
3. **FLESH OUT STRATEGIC PLAN SECTIONS** - Board and staff teams were assigned to review and refine each section discussed at the retreat.
4. **DRAFT STRATEGIC PLAN** - The executive director compiled and edited sections into complete a Strategic Plan draft.
5. **MEMBER REVIEW** - A draft plan was sent to the membership to review ahead of our 2024 Annual Meeting. Staff and board members will present the plan at the Annual Meeting and allow opportunity for feedback. The intent of this feedback will not be to rehash core goals, but to help the board refine any points that are not clear. After this period, the board will make final edits and vote to approve.
6. **DEVELOP IMPLEMENTATION PLAN FOR EACH GOAL** - In Q1-Q2 2025, board, staff and committee leaders, overseen by the executive director, will begin working on an implementation plan for each goal.

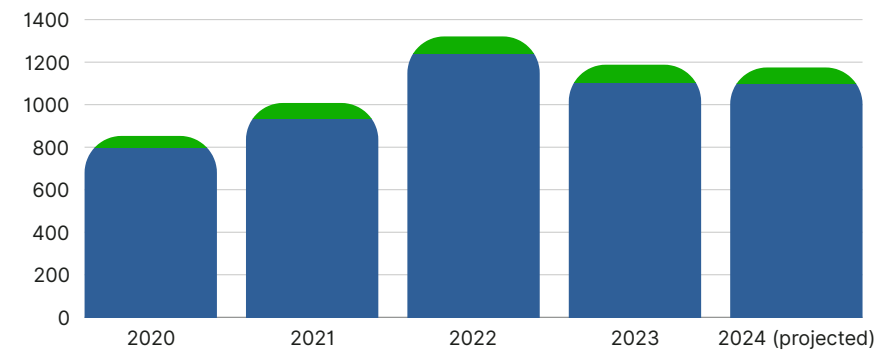
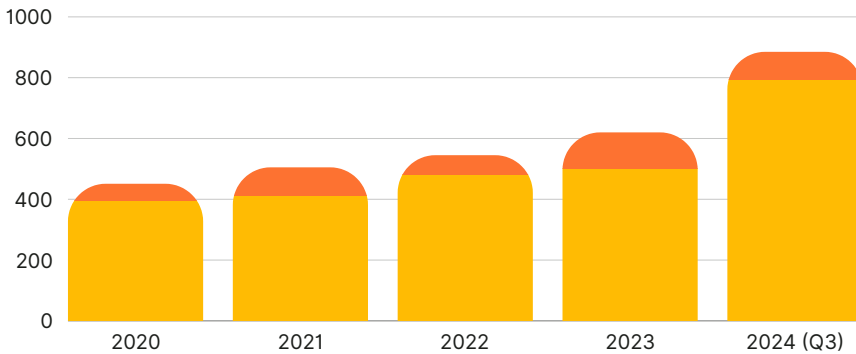
The Past 5 years: Fundraising & Membership



YEARLY INCOME/EXPENSES



MEMBERS & DONORS



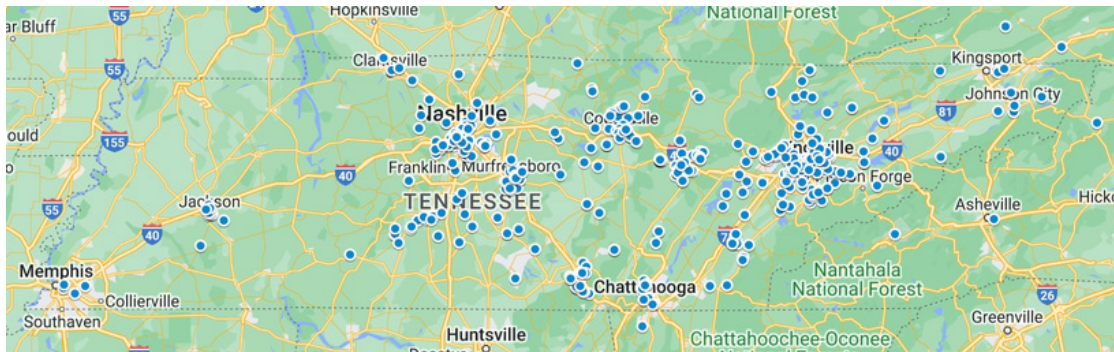
The Past 5 years: Fundraising & Membership



MEMBERS & MOBILIZATION

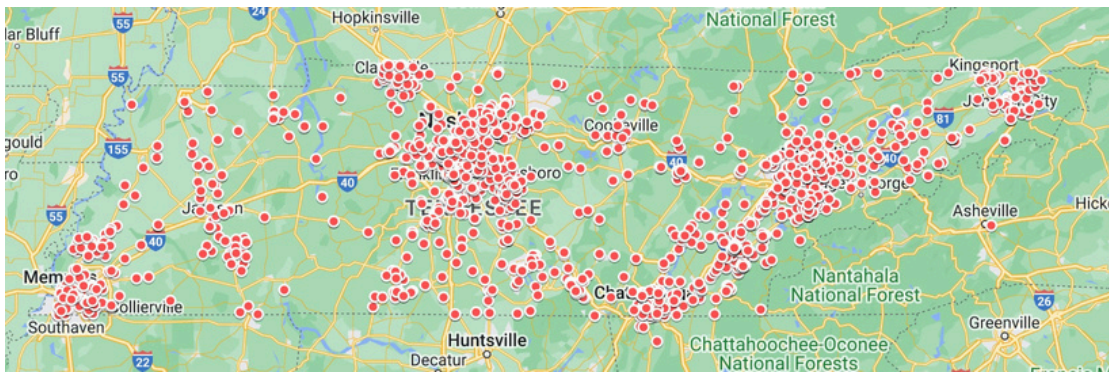
CURRENT MEMBERS: **805**

**Paid dues in the past two years*



MOBILIZATION SINCE 2022 (as of August 2024): **3200**

**People who have taken at least 1 action with SOCM*



CHAPTERS



ACTIVE



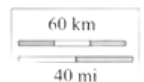
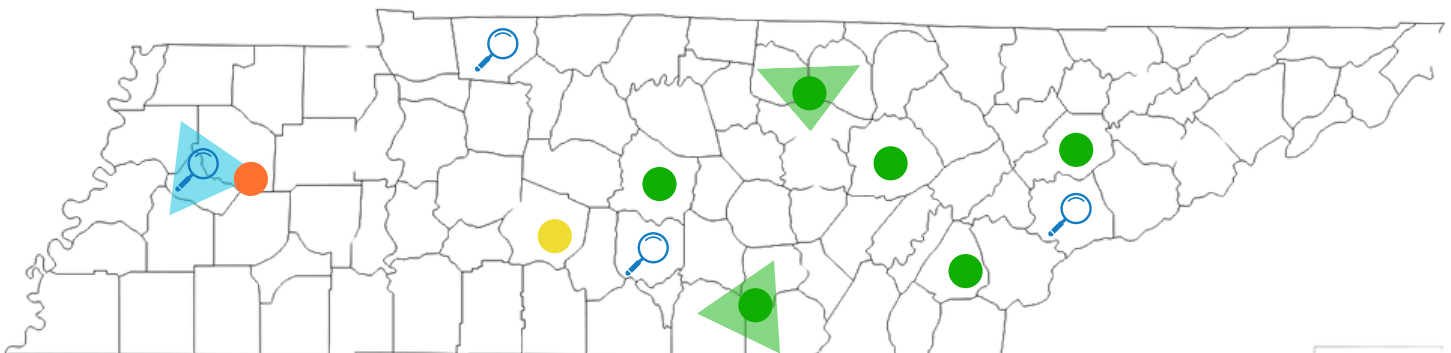
INACTIVE



SUPPORT CHAPTER



EXPLORING



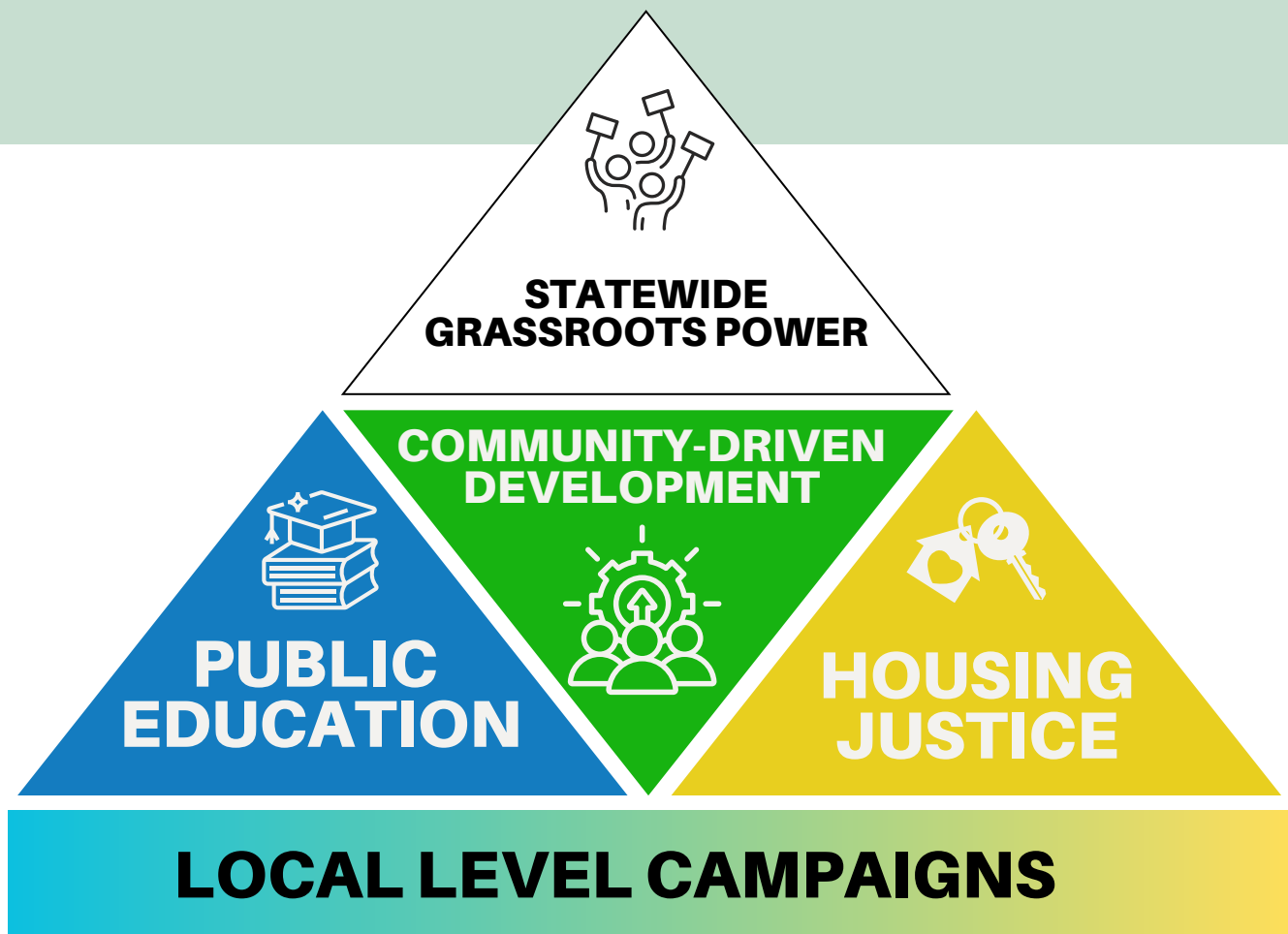
PART 1

STRATEGIC ISSUE CAMPAIGNS:

LOCALLY GROUNDED, STATEWIDE IMPACT

As we continue to run local campaigns around the critical issues facing our communities, it's important that we consider how to leverage the power of our statewide membership! There are hundreds if not thousands of issues we could focus on in our local communities. As we decide on local priorities within our chapters, we should be strategic and consider which issues are both deeply felt in our own backyard AND will also help us shift the balance of power at the state level. This means running campaigns that have LOCAL targets and goals but also have the potential to build towards STATEWIDE targets and goals.

Over the past few years, three core campaign areas have emerged at the intersection of our local work and statewide impact. This section will outline those three campaign areas, why they are worth our attention, and how we can focus our time, money and organizational resources to build powerful issue campaigns.



The logo features the words "PUBLIC SCHOOL STRONG!" in a bold, white, hand-drawn font. The text is set against a red heart shape, which is itself inside a blue diamond shape with a white outline.The logo consists of a white triangle with a blue outline. Inside the triangle, there is a blue icon of a stack of books with a graduation cap on top. Below the icon, the words "PUBLIC EDUCATION" are written in a bold, blue, sans-serif font.

BACKGROUND:

For years, Tennessee has trailed most of the country in per-student funding, and came in 46th out of 50 states in 2022. As our schools continue to be under-resourced, Tennessee public schools have been the recipient of continued attacks by our state legislature including:

- increasing calls for the removal of LGBTQ books from schools and libraries;
- revisions of classroom history curriculum;
- increased reliance on high stakes tests as the sole indicator of a student's performance;
- state representatives overriding local school boards to approve for-profit, religious charter schools;
- a proposal by our Speaker of the House to reject \$1.8 billion in Federal education money that funds our school lunch program, support for students with disabilities, and other Title 1 programs;
- Governor Lee's continued attempts to privatize our public schools by expanding the private school voucher program.

Each of these attacks have an overwhelmingly disproportionate impact on rural school districts, low-income urban school districts, and families in predominantly Black and Latinx communities.

In 2021, amid these attacks on public schools, our membership voted to invest in building a cross-county organizing infrastructure focused on activating local communities around a positive agenda for their local public school districts. While the state legislature has its agenda of defunding public schools, we know the vast majority of Tennesseans, regardless of political affiliation, believe that all students deserve access to high-quality public education. We believe that a successful strategy to defend public education in Tennessee must be rooted in listening to our local communities and developing grassroots leaders within local school districts. We also know that building power means we need to place particular focus on engaging low-income school districts, communities of color, and rural counties.

In this context, we believe that shifting power in the long term begins by galvanizing working families at a local level around a positive vision for their school districts. This vision should:

- 1) speak to students'/parents'/educators' day-to-day lives;
- 2) share common interest across traditional political lines;
- 3) have solutions that can be acted on with local decision-makers; and
- 4) highlight contradictions between local needs and the agenda of our state legislature.



BACKGROUND (CONT'D)

Over the past 2 years, we have learned a lot from our friends at Down Home North Carolina and the HEAL Together NC coalition. In September 2023, borrowing heavily from their work, SOCM launched the Public School Strong (PSS) TN distributed organizing campaign with our Tennessee For All (TN4All) coalition partners. This long-haul campaign focuses on:

- **Building a base of active and engaged parents, educators, and community members** - Create a low-barrier-to-entry ladder of engagement that allows new people to become engaged with their local school board meetings and in some cases, develop local issue campaigns.
- **Gathering quantitative data from Tennesseans about local school district needs and priorities** - Through events, tabling, 1:1 outreach, and digital surveys, we need to continue collecting information from Tennesseans about their priorities for their local school districts.
- **Running State and local district issue campaigns** - Data collection and base-building allows our members to develop truly community-informed local and state level school budget priorities that are backed by people who can carry out effective campaigns.

WHAT'S GOING WELL?

- **Voucher Victory:** Gov. Lee's Voucher bill is dead for the year! We, with our TN4All coalition partners, played a major role in this effort and have earned a very good reputation as leaders in the fight for public schools.
- **Involvement:** Through a clear ladder of engagement, 128 people from across 22 counties have made the commitment to be #PublicSchoolStrong in urban, rural, and suburban communities. Over 800 people from across Tennessee completed our SOCM/TN4All education issue survey.
- **Political Engagement:** 770 hits through our voucher action link, driving over 3000 emails to legislators regarding federal funding and the universal voucher scheme. 25 constituent legislative meetings. 18,000 voters engaged through texting campaigns to take action re: vouchers. Coordinated requests for resolutions opposing vouchers on both school board and local governing body levels. We have built relationships and a good reputation with ally representatives on both sides of the aisle and are being asked to help craft legislation for the next session.
- **Press/Media:** Over 40 press mentions, ads in 90 rural newspapers, and the media is using our messaging effectively and well. Quotes and press have highlighted a variety of parents, teachers, and community stakeholders who are part of the movement.
- **Direct Actions:** Many member-led actions happened this season across six counties (Blount, Knox, Davidson, Rutherford, McMinn, Anderson, and Shelby), including press conferences, community town halls, and virtual town halls. These were led by teachers, parents, and neighbors in response to vouchers and the threat of loss to federal funding.
- **Coalition:** Public School Strong TN has strengthened coalition work with national and statewide partners. There is growing partnership with Tennessee Education Association and the TN Retired Teachers Association, with possibilities to center teachers in this movement within a strong existing labor structure. The connections with HEAL and EdTrust have given us access to more capacity and resources in the midst of a statewide campaign. Public School Strong has given infrastructure to groups within the TN4All coalition the capacity to grow the movement and build up stronger labor/faith solidarity across the state.

LONG-TERM VISION:



*This vision was developed by our Public Education steering committee after compiling data from 800+ long form public education surveys from community members in 29 counties. These key areas are intended to be a guidepost for our more specific local and statewide public education campaigns.

Fully-Resourced Classrooms

- Competitive pay for all teachers and school staff
- 21st century classrooms and school buildings

Restorative Accountability

- Ending state-imposed over reliance on high stakes testing
- Restorative, equitable accountability measures for teachers and students

Whole-Child Learning

- Wrap-around services and professionals to meet the needs of the whole child beyond academics
- Curriculum that offers students an honest, creative, and diverse learning experience

SHORT & MID-TERM CAMPAIGN GOALS:



Short-term goals (1-2 years):

- Stop Governor Lee's voucher expansion bill (again)
- Pass positive legislation focused on reducing reliance on standardized testing and channeling more funding to early childhood literacy



Mid-term goals (2-5 years)

- DEFENSE: Stop any efforts to privatize or divert funds from our public schools
- DEFENSE: Rolling back unrealistic, punitive accountability measures that harm teachers and students (i.e. third grade retention, A-F school grading, MOUs with police departments, etc.)
- OFFENSE: Closing corporate tax loopholes to secure universal pre-k for all 4 year-olds in TN
- OFFENSE: Reduce standardized testing requirements to federally mandated levels



BUILDING OUR BASE

CURRENT BASE

PSS STEERING COMMITTEE + POLICY COMMITTEE	18 members
SOCM CHAPTERS with PSS TEAMS	Knox County Education Coalition SOCM; RuCo SOCM; McMinn County Neighbors SOCM
PSS COUNTY TEAMS (without SOCM Chapter)	Blount County; Montgomery County; Hamilton County (CALEB); Shelby County; Davidson County; Williamson County
PSS MEMBERS (attended orientation and attending School Board meetings)	175 members in 24 counties
SUPPORTERS (folks who have taken at least 1 action)	2800+ people in 40+ counties

BASE-BUILDING GOALS

YEAR	PSS MEMBERS/# OF COUNTIES/TEAMS
CURRENT (Sep. 2024)	128 members/22 counties/10 teams
2025	220 members/30 counties/15 teams
2028	550 members/80 counties/25 teams
2030	800 members/95 counties/35 teams

STRATEGIC PARTNERSHIPS

Partnership we HAVE:

- Tennessee for All
- SEIU 205
- Tennessee Education Association
- HEAL Together
- EdTrust of Tennessee
- TN Retired Teachers Association
- Civic TN

Partnerships we MAY WANT to develop

- AROS (national training network)
- NAACP (connect with Black leaders and education task forces → find where there is alignment in work and potential to build capacity)
- TIRZA (Gamaliel education task forces → connection to faith communities + potential to build capacity)
- League of Women Voters (voter engagement)



HOUSING JUSTICE

BACKGROUND:

Our Knox County chapter was founded in the early 2010s. Since its early years, the chapter has focused on housing security, with SOCM members drawing from their own experiences of insecure housing to work towards solutions. Throughout the pandemic, our members conducted house visits with residents who received eviction notices, providing information about the eviction moratorium along with resources to help ensure non-displacement. Since 2020, SOCM members in Knoxville have continued their work to educate tenants about their rights, hold landlords accountable, and work to secure legal counsel for tenants facing eviction. We published an eviction defense guide that has been widely used to educate tenants on their rights when facing eviction and held several informational meetings for different communities throughout the city. Our members were instrumental in working with city agencies, Legal Aid, and partners at the University of Tennessee Law School to establish Knoxville's Eviction Prevention Program!

Knoxville members joined coalition partners for a housing "Day on the Hill" in Nashville on February 20, 2024 to meet with legislators about anti-criminalization and eviction prevention legislation. Members also co-sponsored Cattywampus Puppet Council's bi-annual street festival and parade entitled "We Dwell Together". SOCM members supported an educational component of Cattywampus's youth and adult workshops leading up to the parade. Our Knoxville Chapter held their 2024 strategic planning meeting in January and have laid the groundwork for the next phase of the campaign to make access to legal counsel permanent and fully funded.

We know that displacement, lack of renter protections, and affordable housing are no longer just urban issues. Large development projects like Ford's Blue Oval plant are changing the landscape of rural communities. Rapid gentrification of many urban centers have forced working class families into the suburbs, causing a ripple effect of displacement and skyrocketing housing costs. We have begun to explore ways to expand the lessons we're learning in Knoxville to Maury County and prospective members in Blount County.



WHAT'S GOING WELL?



- SOCM led the creation and publication of the Tenant “Know Your Rights” guide that is now being used by the City of Knoxville and community organizations
- We WON expanded access to counsel program that has been implemented by the city
- The Knoxville Chapter is a long-standing chapter with members who have institutional knowledge of banking and eviction campaigns
- Developing a statewide coalition with OpenTable Nashville, TN4SafeHomes, and others focused on statewide housing policy
- Partnered with Cattywampus Puppet Council on their 2024 parade and block party and plan to continue this partnership in 2025!
- We have the support of city housing support staff
- Strong relationship with University of Tennessee-Knoxville faculty and departments, including funding streams and technical support for chapter-led goals
- Past “Tentpole” victories that we can build on—expanded access to counsel plan and, to a lesser extent, the banking CBA
- Strong group of members who have been affected by the issues they’re working on
- Working with UT on tenant interviews to evaluate the new expanded access counsel program

SHORT & MID-TERM CAMPAIGN GOALS:



Short-term goals (1-2 years):

- Formalize evaluation process for expanding tenant access to counsel project with UT Knoxville and city partners
- Complete 30 1:1 interviews with tenants who have utilized the city’s newly-established program
- Develop a platform of state-level housing policy goals with TN4Safe Homes coalition partners
- Double our base of active members engaged in this campaign
- Establish a community informed “Housing Bill of Rights” for Knox County that serves as a north star that can inform subsequent base-building and campaign goals



Mid-term goals (2-5 years)

- WIN permanent and fully resourced Right to Counsel program in Knox County
- BEGIN Right to Counsel campaigns in 2 additional counties
- Pass state level policy that will strengthen tenant rights



BUILDING OUR BASE

CURRENT BASE		BASE-BUILDING GOALS	
		YEAR	Member #s
KNOXVILLE CHAPTER	20+ core members (renters, housing service providers, etc) 138 active members		
SUPPORTER contact lists	300+ in Knox County (action-takers, non members)	2025	10 new core members in Knox County; one additional county team of 10+ people
MAURY COUNTY CHAPTER	co-hosted canvassing and two Know Your Rights workshops with TN4SafeHomes. Maury chapter does not currently have capacity to commit. We have around 175 on Maury County contact list)	2028	250 active members in Knox County (30+ core team/80+ active), 3 additional County campaigns (10+ core team/25+ active)
OTHER	SOCM has hosted an info meeting with interested folks in Blount County... potential to replicate Knox County RTC campaign here	2030	300 active members in Knox County; with at least one county team in East, Middle, West TN

STRATEGIC PARTNERSHIPS

Partnership we HAVE:

- TN4SafeHomes
- OpenTableNashville
- UT Knoxville CURCI program
- AJRC at UT Knoxville
- Statewide Housing Coalition (name TBD)
- Legal Aid of East TN

Partnerships we MAY WANT to develop

- National Coalition for a Civil Right to Counsel
- TN4ALL/Blue Oval Good Neighbors
- National Low Income Housing Coalition
- Neighborhood groups and institutions in areas where we are organizing



COMMUNITY DRIVEN DEVELOPMENT

BACKGROUND:

Early last year, SOCM members and other community members worked to defeat a proposed sand quarry in Grundy County using the County Powers Act. Towards the end of 2023, the same company, Tinsley Properties, put forward another quarry proposal in Marion County. Residents quickly came together and contacted SOCM for support. Our staff and Grundy County members have been working closely with them to organize against the development. In January, we held a packed house strategy meeting to discuss next steps.

Two exciting things came from that meeting: First, there was consensus around a long term campaign focused on bringing together unincorporated communities across the South Cumberland Plateau around a community informed vision for development and to work to pass policies that allow greater community participation in development decisions. Second, this group of Marion, Franklin, and Grundy county residents voted to form the newest SOCM chapter! There is an amazing group of leaders in the community with a great amount of knowledge and energy around this work.

While Grundy/Marion/Franklin counties are the focal point of this work right now, we see “Community Driven Development” as a potential statewide committee that could hold a number of related campaigns. Some of the more local environmental issues that our members are engaged with in Campbell County, Cumberland County, and Putnam County are rooted in the desire for local communities to have more determination in how development occurs in their communities. There is also potential for SOCM to have a role supporting local residents and our TN4All coalition partners in rural West TN as they fight for a Community Benefits Agreement with Ford’s Blue Oval development in Haywood County.

BASE-BUILDING

Plateau & Valley
Chapter

43 dues paying members; 25 on core team

Supporter lists

200+ contacts in tri-county area who have taken action with us

Base-building goals

Detailed base-building goals have not been set as of Aug 2024

WHAT'S GOING WELL?



- WIN at Clouse Hill (Grundy County) using the County Powers Act has given direction for future work
- Jackson Law passed in Monteagle in 2023
- Developed a system to track and monitor new quarry permits in the tri-county area
- Members raised over \$19k for JumpOff quarry legal fund
- Both Grundy and Marion campaigns have had large (and engaged) core team
- Residents from Franklin/Grundy/Marion counties voted to form a SOCM chapter!
- We've built a large contact list that has fairly high membership conversion rate
- This campaign is coming directly from area residents across lines of party politics
- Multiple new communities across the plateau are interested in getting involved in chapter work
- Leaders have stepped up when asked, joined the board, written articles, and have participated in broader SOCM efforts

LONG-TERM VISION:

We will work with community and government stakeholders to develop and pass a regional development plan for Marion/Grundy/Franklin counties. This plan should place enforceable guardrails on development and ensure that the local natural environment is preserved and that local residents are not being left behind as the economy grows.

SHORT & MID-TERM CAMPAIGN GOALS:



Short-term goals (1-2 years):

- STOP the Jumpoff quarry development in Marion County
- Challenge all new quarry permits as they arise
- Develop a "watch dog" team who can monitor development permits as they arise and determine which ones we should organize around
- Develop a state-level policy platform focused on improving the permitting process



Mid-term goals (2-5 years)

- Gain more responsive county government by flipping key commission seats
- Implement the County Powers Act in all three counties
- PASS state level policy to help regulate unchecked extractive development
- Develop a community-informed platform for the tri-county region focused on a vision for positive development that includes specific policy recommendations



TO EXPLORE: RURAL WEST TN (BLUE OVAL)



Our TN4All coalition partners have helped form a large community group with people from Haywood, Tipton, Fayette, and Madison counties called Blue Oval Good Neighbors (BOGN). This group of residents is focused on developing and securing a **community benefits agreement with Ford's Blue Oval plant**. The intent is to develop a set of resident-informed community investment demands focused on local workforce development, affordable housing, environmental protection, and investment in public infrastructure. As the people in this region experience extremely rapid growth in the coming years, all three of SOCM's campaign priority areas are relevant.

This project has an incredible core group of residents and the support of the UAW. While our TN4All coalition partners have helped form the Blue Oval Neighbors group, there is currently no single organization holding down the long-term work for this group. We have a long history in Madison County but have been inactive there for years. Middle Tennessee Organizer Theeda Murphy has been an active member of BOGN's planning committee, and we have hosted one Public School Strong event with them.

BLUE OVAL CAMPAIGN PRIORITIES:

Through the organizing efforts of our TN4All partners, residents have already developed a community benefits platform that outlines key areas of investment that they want Ford to focus on. These are outlined below:

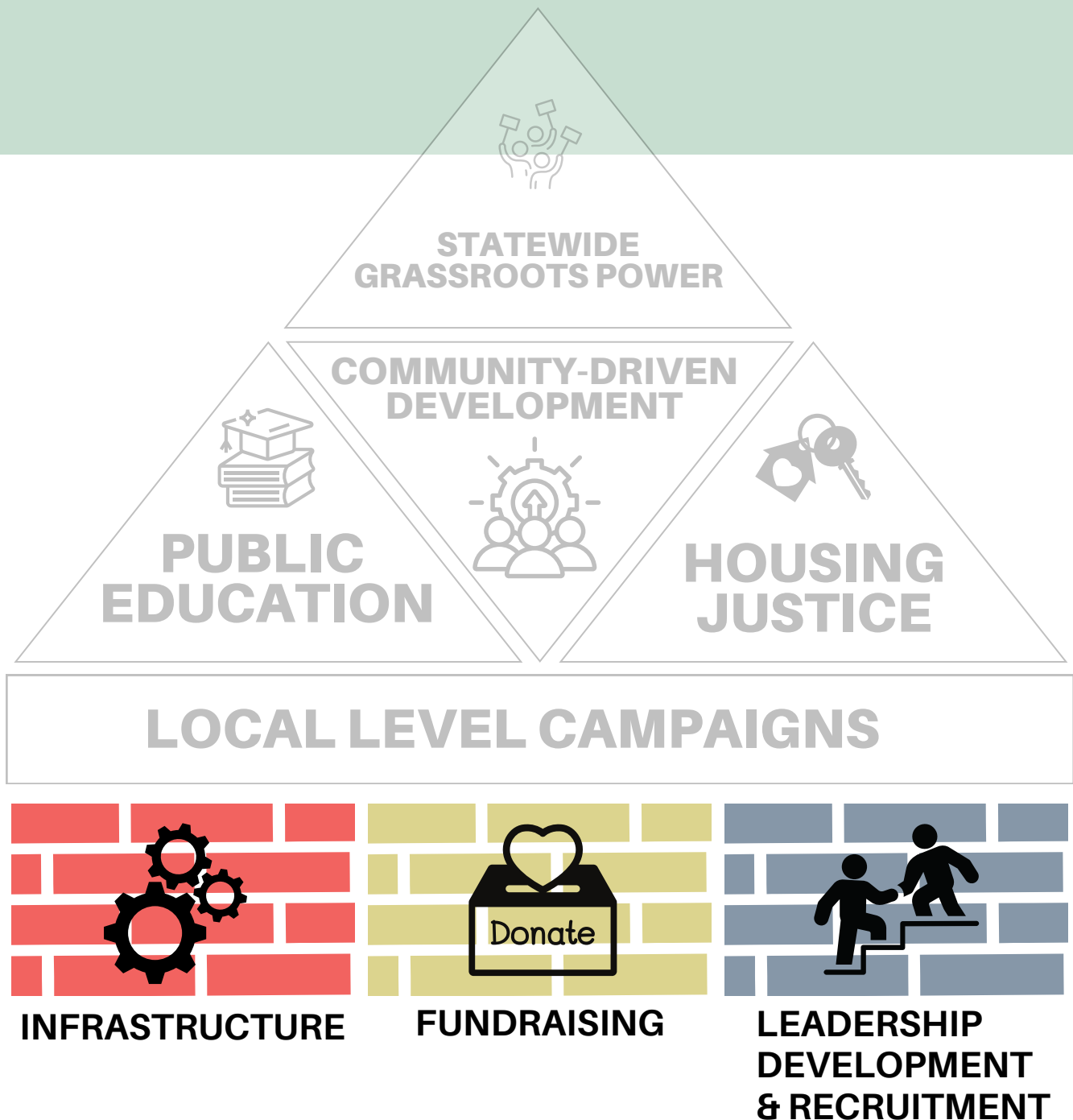
- **Investing in Workforce Development and Education.** We demand that Ford allocates funding to grow the next generation of Factory Leadership through funding county University Programs and pre-apprenticeship programs for local residents.
- **Safeguarding the Agricultural Community and Preventing Displacement.** We demand that Ford allocates funding to affordable housing units, to a resident displacement fund, to a legal protection fund, and to training and educating area farmers.
- **Preserving the Local Environment.** We demand that Ford allocates funding to assess the plant's impact on local land, water, and air pathways affecting the local ecology and health of residents and employees.

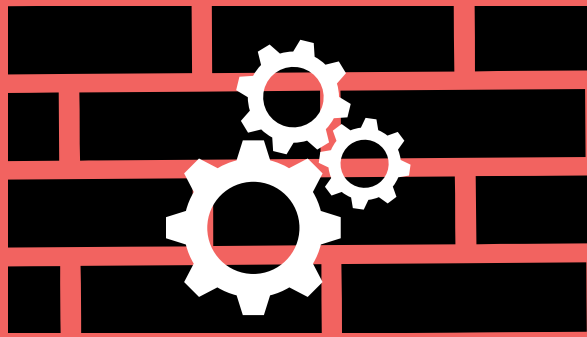
These identified resident priorities align almost directly with SOCM's key campaign areas (Public Education, Housing, and Community Driven Development). We should explore whether and how SOCM may have a role in supporting this work. Since public education has come up as a significant area of focus for Blue Oval Good Neighbors, there MAY be an opportunity for SOCM to work with TN4All partners to help anchor long term organizing. As a starting point, it might make sense for us to focus on building out Public School Strong teams in each of the impacted counties with a shared vision for public education funding. Regardless, we feel that building membership and/or coalition with folks in this region is critical to building statewide power.

PART 2: ORGANIZATION BUILDING

HOW WE BUILD THE POWER OF SOCM TO MEET OUR CAMPAIGN GOALS

While the Strategic Issue Campaigns section outlines WHAT we hope to achieve together in the next five years, this section focuses on HOW we will get there. There is a LOT of behind-the-scenes work that goes into building and sustaining our shared efforts. This section will outline some key goals that will help us grow SOCM's capacity between now and 2030.





INFRASTRUCTURE

Our ability to build people-power and achieve our campaign goals is grounded in our membership. There is a lot that goes into keeping a member-led organization running smoothly. Keeping members informed, facilitating democratic decision-making, developing effective strategy, and carrying out campaigns requires an IMMENSE amount of structure and coordination involving staff, board, and member leaders. Below are a few goals that we have set to help us build this infrastructure over the next 5 years.



Expand and retain a strong staff team to meet the needs of a growing membership

As we continue to grow our membership, identify new chapters, and expand statewide campaign work, we desperately need additional staff capacity. Our current staff is doing incredible work, but we are stretched thin. The board, finance director, and executive director will work on solidifying a compensation plan and raising a budget that will allow us to provide competitive compensation so that we can continue to recruit and retain an exceptional staff team. While additional roles and specific job descriptions will be developed, below are positions we have identified as foreseeable priorities over the next five years.

Grassroots Development Coordinator

The board has set a goal of increasing our grassroots donor base so that we are less reliant on foundation grants. The Grassroots Development Coordinator would work closely with our Finance/Operations Director, ED, and a Fundraising committee to plan and coordinate member-led grassroots fundraising efforts throughout the year and help follow up with new and potential members. They would also support the ED and Operations/Finance director in identifying new grant opportunities.

Leadership Development Coordinator

Leadership development is a core part of SOCM's mission and is essential to building a powerful member-led organization. While supporting member development is an aspect of every staff member's job, we are at a stage in our growth where we need a highly-skilled staff member who is dedicated to developing, facilitating, and coordinating a robust training agenda with our members and staff.

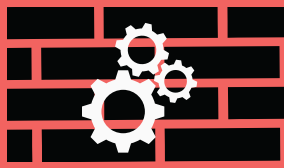
Public School Strong Outreach Coordinator

Public School Strong has been a flagship statewide campaign that has been incredibly effective at recruiting and mobilizing new people. The primary function of the PSS Outreach Coordinator will be to support our member leaders and PSS Organizer in follow up with the thousands of organizing leads we are gathering, funneling them into our PSS ladder of engagement, and getting them connected to organizing opportunities.

Organizing Staff

Community organizers provide critical ground-level support to our members. We know we will need to add additional organizing staff as SOCM grows. Below are several areas where we foresee need in the next 5 years:

- Rural West TN Organizer
- Plateau and Valley Organizer
- Additional Middle TN Organizer (Putnam, Jackson, Overton, Montgomery counties)
- Housing Campaign Organizer focused on supporting cross-county campaign work



INFRASTRUCTURE



Form at least three new chapters in strategic locations that will help strengthen SOCM's base-building and campaign goals

There is not a single, linear path by which SOCM chapters are initiated. Sometimes chapters emerge organically after people have come together around a particular challenge their community faces and then reach out to us for support. But often, chapters have formed because our members and staff identify specific communities that have strategic significance. While SOCM never starts a chapter without the expressed desire of a core group of committed residents, we also know that chapters don't form by magic. We have to be intentional about identifying potential areas to organize and initiate those conversations to find out if there is an appetite to start a chapter. **We have set a goal of forming three new chapters over the next five years.** Below are three areas in particular that we have identified **to explore** based on current strategic assessments.



Rural West TN (Haywood, Madison, Tipton, Fayette counties)

We have a significant opportunity to work with TN4All partners to build long-term organizing infrastructure with rural, black communities in connection with Ford's Blue Oval Plant (*see Campaigns section). There is a deep history of people's movements in this region and potential support organizing connected to all three of our campaign priorities. This could also provide an avenue to reactivate many of our inactive or former Madison County members.



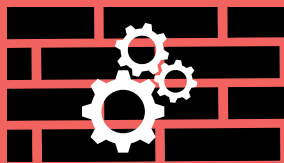
Montgomery County

We have a lot of activated PSS participants in Montgomery County, a board member based there, and several strong relationships with community leaders including folks in CMCEA (the education association). Montgomery County is also one of the few "purple" districts in TN, which make a clear priority area for any legislative campaigns.



Blount County

We have had amazing engagement in PSS campaign in Blount county with a lot of active participants and several extremely strong leaders. We have also begun meeting with folks interested in replicating the Tenant Access to Council campaign here.



INFRASTRUCTURE



Develop an administrative and financial toolkit to ensure long-term organizational continuity

Our administrative infrastructure and financial record-keeping has been a major strength of SOCM for decades and has helped provide a strong backbone for the organization. This has been due, in large part, to the skill and institutional knowledge brought by Linda Cowan who has been with SOCM for over 30 years. As Linda prepares for retirement in the coming years, it is a significant organizational priority for our board and staff to prepare for this so we can maintain continuity and keep our work moving forward. **To help with this process, a subcommittee of the board and the ED will work with the Director of Operations and Finance to:**

- Develop an administrative and transition plan
- Prepare a financial and administrative toolkit that can be used as a reference and guide for the board, executive director and new administrative staff member
- Mentor a new staff member to fulfill administrative roles and responsibilities



Reactivate a statewide fundraising committee

The SOCM Board will reestablish a Fundraising committee made up of at least one board member, the fundraising chairs of each chapter, and at least one major donor, and will be staffed by the Grassroots Development Coordinator (when hired). This committee will be responsible for:

- Coordinating cross-chapter fundraising events and campaigns
- Working with staff to develop and implement fundraising training and workshops for members



Update our by-laws to reflect current organization

Our organizational by-laws outline our governance structure, legal responsibilities, and foundational policies for how we operate. This document has not been reviewed or updated since 2013.

- The board will review this document and make recommended revisions to present to our members for a vote at our 2025 Annual Meeting.
- We will include a policy that the board will review the by-laws at minimum every 3 years.



FUNDRAISING

*SOCM's grassroots model is built upon collective participation and shared responsibility at all levels, including fundraising. Over the years, SOCM has built and maintained a solid grassroots fundraising program that supports our budget needs each year. But as our chapters and campaigns expand, so will our budget and income needs. We will continue to solicit members and donors in person, by phone, through mail, and online, and will seek foundation grants as they fit with our values and priorities. In addition to our regular annual fundraising efforts, **SOCM will develop a three-year fundraising campaign** that will support SOCM's work during the 5-year strategic plan and beyond.*

Below are a few specific fundraising strategies we will use to grow our grassroots donor base.



Fundraising workshops

SOCM will provide training that will demystify fears around money and fundraising and show the connection between membership and fundraising. We will hold at least one day-long Fundraising 101 training each year for all chapter fundraising chairs and other interested members. We will provide additional supplemental training as needed. SOCM will explore ways to record training for online viewing, provide training by Zoom, and hold in-person training workshops. We will provide printed handouts and digital handouts as downloads on our website. Topics for SOCM fundraising workshops will include but are not limited to:

- Addressing the fears around money and asking
- Showing the correlation between budget and fundraising
- Understanding our budget
- How to make a donation ask
- Steps on how to hold or host fundraising events (local, chapter, regional, and statewide)
- How to thank donors



Focus on increasing monthly donations

Monthly donations allow consistent support to our work locally, regionally, and statewide. Although monthly donations are not for everyone, we must increase the number of people who contribute monthly to help support our monthly cash flow needs especially as our budget grows over the next five years. We will do this by:

- Encouraging monthly donations as part of dues enrollment
- Emphasizing monthly giving in solicitation materials
- Developing a campaign to solicit monthly giving that includes incentive levels



FUNDRAISING



Develop a culture of “making the ask” for member recruitment and donations

Every member recruited becomes a potential donor and asking for donations grows our capacity to support our organizational needs. Grant funds are restricted to the focus and preference of each foundation whereas income raised from grassroots sources is unrestricted. SOCM will develop resources to increase our confidence in “making the ask” at every opportunity—in person, by phone, at local chapter meetings, at regional meetings, at statewide meetings, at events, on Zoom calls, on conference calls, and in other avenues. Here are some of the ways we will do this:

- Encouraging monthly donations as part of dues enrollment
- Creating opportunities for each chapter to host an annual chapter fundraiser
- “Passing the hat” at meetings
- Regular member-led phone banking
- Donation boxes for tabling boxes
- Create materials with QR codes to make donating easier
- Hosting fundraising events
- Recruitment contests
- Donation links on digital material such as the e-newsletter, *SOCM Sentinel*, and social media.



Make SOCM’S budget more transparent to membership

SOCM currently provides access to the IRS Form 990 and annual audits upon request. Financial reports are submitted to board members at board meetings. When requested, board members can share this information with members, and chapter reps can share with chapter members. As a member-run organization, it is important that our members understand where their money is going. We will increase understanding of the budget and transparency with our members by:

- Creating a video explaining budget components (income, expenses, assets, liabilities, and fund balance) that can be accessed by members
- Providing a visual presentation of financial reports at the Annual Meeting
- Including a short financial summary in every quarterly *SOCM Sentinel*
- Providing a chapter specific workshop showing the correlation of income and expenses as related to the functioning of the chapter
- Providing printed materials and graphics that show numbers and outcomes for money spent



LEADERSHIP DEVELOPMENT & RECRUITMENT

While experience may be the best teacher, there are experiences we can (and must) share if we are to be effective. Everyone has the capacity to organize with their neighbors, but this is a skill that is learned through training, practice, study, and a willingness to learn from and with others. SOCM's greatest strength is our membership and we must continue to keep the goal of identifying and developing new leaders front and center. Below are a few ways we will build on our existing practices over the next five years.



Every new member will be provided with a clear understanding of SOCM's structure, Mission, Vision, Values, and Theory of Change

As SOCM grows, it is critical that our members have a clear understanding of who SOCM is, how we're structured, and how we understand the role of community organizing in creating social change. While we want to keep the barrier to entry low, it is also important that our members have a set of basic shared values and understand the baseline roles and responsibilities as part of a member-led organization. We have done this to some degree, but we want to create a more structured and measurable way to ensure that each new member feels welcomed and informed.

We will do this by:

- Continuing to hold quarterly SOCM 101 sessions online for new and prospective members (ongoing)
- Incorporating the reading of our Mission and Values as part of the welcome at all chapter and committee meetings (ongoing)
- Publish an updated SOCM Membership Handbook to reflect our current organization that will be sent to every new member (by Q2 2025)



Hold annual planning meetings within each chapter, committee at the beginning of each year

It is important that our chapters and committees establish a clear vision and goals so that we can navigate our shared work effectively. Staff and board will develop a clear template for what yearly chapter and committee planning should look like. By the end of February each year, each chapter and committee will hold a strategic planning meeting that will include the following outcomes:

- a. Review the prior year's goals and whether we accomplished them
- b. Update/establish main campaign goals for the current year
- c. Update/establish outreach and membership recruitment goals for the year
- d. Update/establish fundraising goals for the year
- e. Update/establish leadership development goals for individual leaders and for the chapter as a whole (i.e. training/workshops needed)



LEADERSHIP DEVELOPMENT & RECRUITMENT



Develop an annual Leadership Development agenda and calendar

As members step into leadership roles in chapters, committees, and within campaigns, it is critical that we do our best to ensure that they feel well-equipped. Below are four key program areas that we will develop to provide a more clear and accessible training program.

ORGANIZING 101

We will hold at least one regional or statewide Organizing 101 training each year. This will be a full day workshop open to all members and prospective members and will include the following 101 topics:

- SOCM's Theory of Change
- Effective organizing conversations
- Issue identification
- Identifying leaders/circles of participation
- Campaign strategies and tactics

TOPICAL WORKSHOPS

These are workshops that can be held as needed at the chapter or regional level, virtually or in person.

Topics include:

- Campaign development
- Citizen lobbying
- Media/press/communications
- Power mapping
- Canvassing/Phone bank training
- Effective organizing conversations
- Public School Strong orientation

TRAINING FOR SPECIFIC LEADERSHIP ROLES

These role-specific workshops will be geared towards smaller cohorts of members (5-10 leaders) and will be held as needed. While staff will support facilitation, a key part of this training model is focused on the relationships and knowledge sharing between members. Specific leadership roles that will have dedicated workshops include:

- Chapter chairs (topics include: running an effective meeting; setting agendas; making an ask)
- Notetakers (topics include: using google docs; effective action-oriented notes recap, etc.)
- Fundraising chairs (topics include: grassroots fundraising 101; making an ask)
- Membership chairs (topics include: effective 1:1s; ladder of engagement; documenting outreach)
- Board members (topics include: board orientation and ongoing development)
- Public School Strong teams

POLITICAL EDUCATION AND INFORMAL LEARNING OPPORTUNITIES

While skill building is a key part of leadership development, it is equally important for our members to have opportunities to think critically together about our values, theories of change, movement history, and the current political landscape. We want to foster opportunities for members and the general public to learn from and with each other in more informal spaces. Possibilities include:

- Statewide virtual book club
- "Fundamentals of Organizing" pamphlet in our new member packets with book club opportunities
- Chapter movie nights
- Including member or book/movie recommendations in e-newsletter
- Continuing our SOCM Member Spotlight series

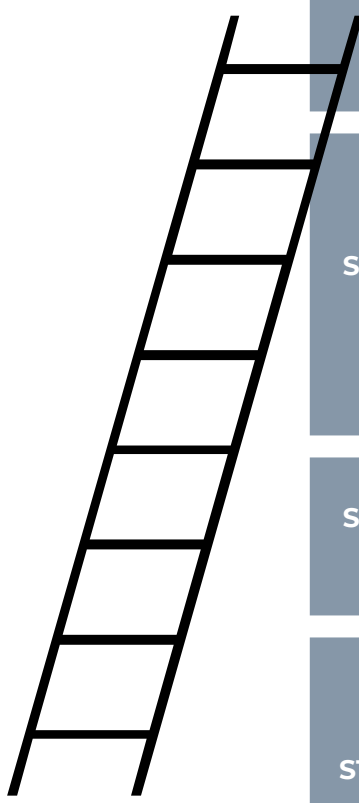


LEADERSHIP DEVELOPMENT & RECRUITMENT



Every chapter and committee will put into practice a “ladder of engagement” to onboard new and prospective members

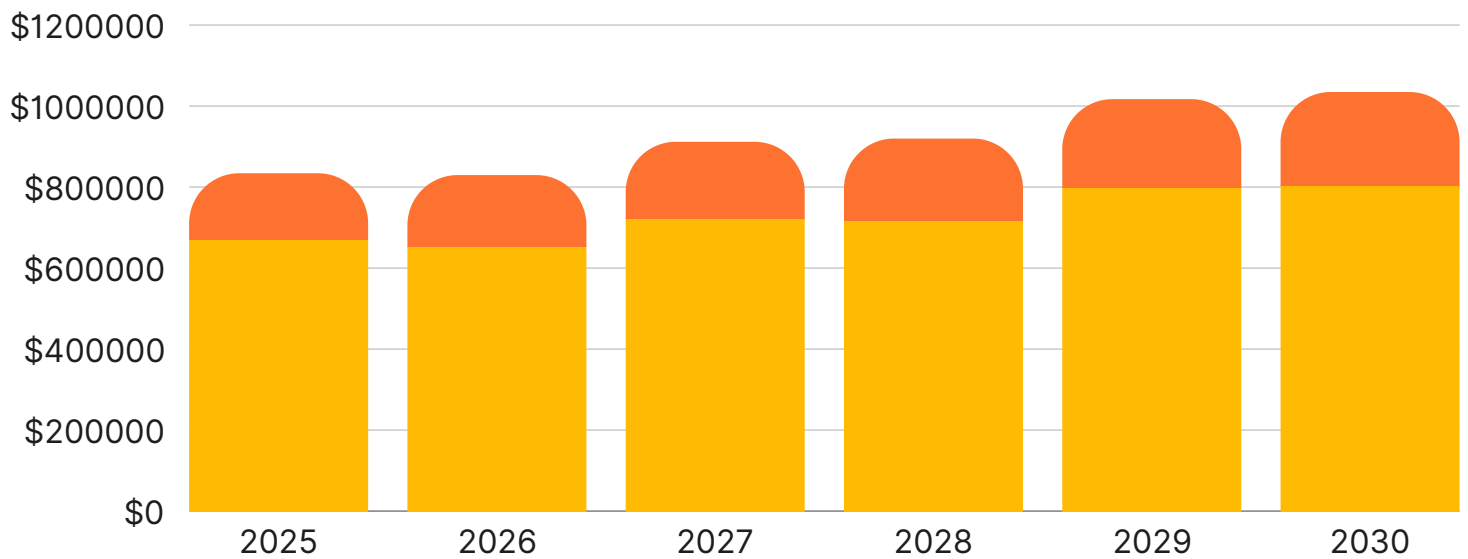
This is to ensure that our staff, chapter, and committee leaders get into the habit of contacting new and prospective members in a timely manner and are presented with clear steps for how to become involved in SOCM. This process will also be used to re-engage our long list of lapsed members. At-large members (those in counties without a chapter) will be given information on connecting with a nearby chapter OR plugging into a statewide committee. The basic “ladders of engagement” are structured as follows.

	NEW MEMBERS	PROSPECTIVE MEMBERS
 STEP 4	Chapter Membership Chair (or assigned chapter member) conducts a 1:1 with new member to learn more about their interests and to share how to get involved in a chapter or committee	*After these initial steps are taken, organizers and chapter members will determine next steps for providing new members with more opportunities to put their interests and skills to use
STEP 3	New member is mailed an introductory packet and receives a welcome call from assigned board member	Chapter Membership Chair, organizer, or assigned chapter member will conduct a followup 1:1 focused on learning more about their concerns/hopes and will share how prospective member can become involved
STEP 2	New member gets added to appropriate chapter or committee Google email list	Prospective member is added to our SOCM weekly email list
STEP 1	New member completes new member signup form	Prospective member completes SOCM's introductory interest survey through tabling, door knocking, etc. This survey will collect useful input about relevant concerns/hopes and will also allow folks to indicate whether they want to receive a follow-up call

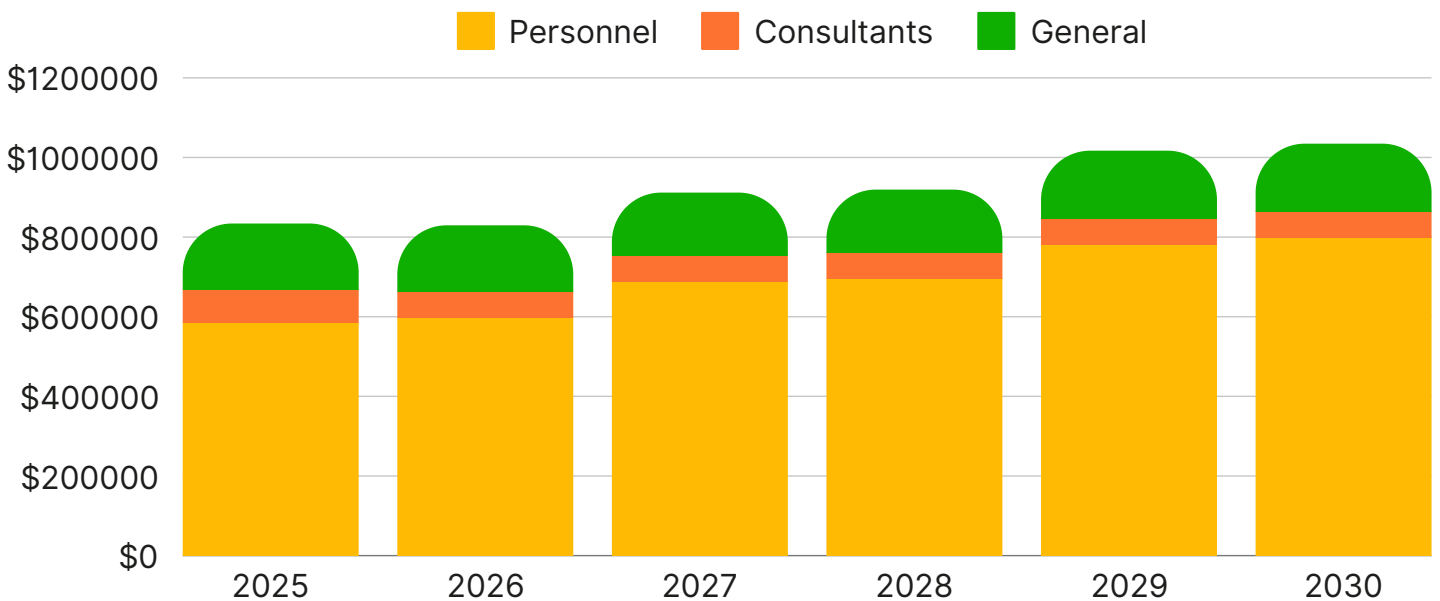
PROJECTED 5-YEAR BUDGET

Below is a preliminary budget that outlines the estimated income we'll need to raise and the expenses we will incur as we grow over the next five years. There are many variables that will change from year to year, and this projection is simply intended to help with long-range planning. The board, finance director, and executive director will update these projections on an annual basis as we develop our annual budgets.

PROJECTED INCOME



PROJECTED EXPENSES





COMMUNITY
ISSUES

5-MINUTE SURVEY!

WHAT ARE YOUR HOPES & CONCERNS FOR YOUR COMMUNITY?



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- PUBLIC SCHOOLS
- HOUSING
- DEVELOPMENT & GROWTH

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