



**SOAP BOX  
DERBY**

**Strategic Plan**  
2018 – 2021

# Strategic Plan 2018 – 2021

## *Project Overview*

---

In the first half of 2018, the Board of the International Soap Box Derby (ISBD) undertook the process of developing a new strategic plan that will carry the organization through 2021. The new plan was vital because of the expiration of the first-ever strategic plan adopted in 2014, and the evolving vision of the new CEO, Board, and partners.

The strategic planning process was designed to engage the Board, staff, and selected constituents in a process to build a consensus about the priorities for the organization for the next three years and would include:

- A constituent-based environmental scan of internal and external strengths and challenges
- Selected strategic directions/focus areas, with goals, objectives, activities to address each
- A reviewed and revised Mission Statement for ISBD
- A recommended organizational alignment of staff, volunteers, and Board committees for effective and efficient plan implementation
- Identification of performance measures organized into a monitoring dashboard
- An analysis of budget trends and expectations for revenues and expenses going forward
- A detailed integrated work plan/business plan and budget for Year 1
- A Strategic Plan document suitable for reproduction and distribution



## *Environmental Scan*

---

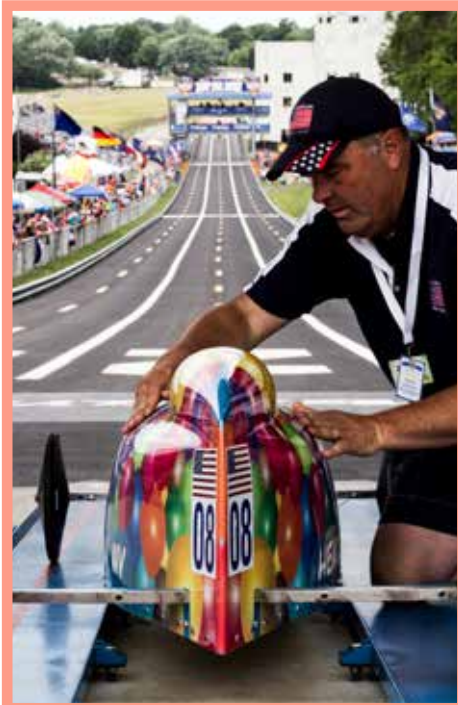
The first step in developing the Strategic Plan was to conduct several surveys of constituent groups including the Board, Staff, and program participants in racing and education. Those surveys were supplemented by retreats conducted for the Board and Staff and numerous Soap Box Derby Committee meetings. The general findings are outlined below, beginning with recent accomplishments.

### **Acknowledged Recent Committee Accomplishments**

#### *All-American Racing Program*

---

- Working with Rally Committee and Education Committee to increase participation.
- Paperwork and support materials more easily accessible to volunteers.
- Consistency in branding of race cities (logos, brochures, website, etc.).



## *Community Connections*

---

- Annual marketing program rolled out for each event, and the opportunity to rent track using webpage for track rental.
- Mailer designed and sent to 300 community organizations to promote track rental.
- Added Inclusion Day, took ownership of Family Day, increased experience/activities at CDC.
- Created turn-key templates to help start new events like Veterans Appreciation Day.
- Increased base program to support events & created promotional video to market events at the track.

## *Education Programs*

---

- Staff Support resulted in tremendous growth in education programs.
- Increased GRC program participation and races.
- Implementation of UA/APS/SBD Zip to STEM program with 8th grade curriculum development.
- Mini SBD program development.
- Developed and implemented interest for education program users.

## *Resource Development Committee*

---

- Establishment of the Bill Speeg Memorial Scholarship.
- Building of solid relationships led to securing grants. Example: Burton D. Morgan one-time grant that allowed for critical capital transportation purchases.
- Development of mailing list and initial mailing.
- Growth in program despite transitions and no dedicated staff person.

## *Finance Committee*

---

- Further integration of QuickBooks.
- Developed and approved annual budget.
- Implemented effective inventory management process.
- Completed full funding of Scholarship program.
- Implemented new policies, procedures and enhanced approval process and key controls.
- Completed annual clean audits; 2017 being the best since inception.

## Marketing Committee

---

- Ensured the brand/logo consistency by rolling out a new website for ISBD and nearly 100 race locals. Developed logos for all the race locals that was consistent with our branding and then provided each race local with branded business cards, brochures, and posters.
- Received a \$120,000 Google AdWords grant and working with Metric Theory to strengthen and enhance the results.
- Upgraded track rental marketing materials. Email and social media campaigns were developed to increase awareness and revenues.
- Marketing campaigns were developed for all major events and carried out. Once developed each year they were further developed based on results from previous year. The plans consisted of increasing our constant contact database, media (ads, print, newspapers, online, etc.), eblasts and social media.



## Identified Strengths, Weaknesses, Opportunities and Threats

### Strengths

- STEM Program
- Rich History
- Passionate Constituents
- Variety of Areas we Serve
- Multiple Revenue Streams
- Engaged Staff & Volunteers
- GRC & Curriculum
- Our Branding
- Financial Stability

### Weaknesses

- Lack of Historical Data
- Internal Communication
- Technology
- Aging Demographic
- Branding
- Race Attendance
- Cost
- External Messaging
- Lack of National Sponsors

### Opportunities

- Enhance Branding
- Collegiate Design Challenge
- Engineering Design Challenge
- Locals Embracing Education Program
- All-American Value
- Expanding STEM and Educational Programs

### Threats

- Cost of Participation
- Declining Participation
- Aging Demographic
- Ability to Engage Target Demographic



# Key Survey Themes and Takeaways

## *Mission and Core Values*

---

- Mission statement needs minor refresh to include education
- We are doing well to achieve our mission.
- Values and drivers still valid, outliers need further discussion and clarification with staff.

## *Top Priorities*

---

- Locals - Promoting our brand, GRC/STEM among all stakeholders. Facilities improvement a priority with board and staff.
- Board & Staff - STEM, strengthen locals, expanding GRC team competition, building our international racing and STEM program, capacity constraints are technology, fundraising, need for donor database and investment in facilities.
- Consistent themes are emerging to help shape strategic planning priorities - costs, fundraising, advertising and promotional materials, website.
- Overall satisfaction with the quality of our programs and products.



## Racing

---

- We're doing a very good job with communication, rally race program, STEM program and customer service. We have room to improve on our newsletter, items given to race cities and local race program.
- Sponsorship, costs, lack of member interest and lack of community support are top reasons why race directors see locals without rally races.
- Race Directors feel information booths, schools, social media and community events are key to recruiting new participants. Reinforces value of educational programs as driver for participant growth.

## Education

---

- Strengths of STEM implementation are student engagement and involvement, ease and flexibility of program and cost.
- Top three limiting factors in utilizing educational products: lack of funding, time constraints to implement and storage.
- Both in school and after school are appropriate settings for implementation of our educational programs.
- Strong interest in Autonomous Soap Box Derby Program.





# Strategic Issues

The following strategic issues were identified as areas of the Soap Box Derby programming that need additional attention in the Strategic Plan.

- Increasing participation
- Expanding STEM education curriculum
- Increasing revenues, fundraising and grants
- Supporting and increasing local races
- Investing in technology
- Securing national sponsorship
- Expanding internationally

In addition, it became clear from our environment scan work that special attention focus needs to be placed on supporting, sustaining and growing our local racing communities nationally. Therefore, we intend to organize a “Standards of Excellence” program that will insure increased strength among our local race communities.

- Establish a task force including Regional Directors to recommend a plan to support growing local organizations while helping struggling organizations turn around and succeed.
- Establish a network forum for race directors to share best practices and struggles with their peers, exclusive of ‘HQ’ participation.
- Provide statistics on recent participation numbers and forecast for strategic plan period based on achieving objectives.
- Formalize communication plan to build the network among Regional Directors, Race Directors and racing families.
- Objective 5: Maintain and expand an international program through partnerships with persons willing to promote the International Soap Box Derby mission throughout the world.

# Strategic Plan 2018 - 2021

## *Mission*

---

The International Soap Box Derby® is a non-profit youth education and leadership development organization whose mission is to build knowledge and character, and to create meaningful experiences through fair and honest racing competitions, STEM curriculums, and other community-focused activities.

## *Soap Box Derby Traditional Values and Core Drivers*

---

- Youth leadership development
- Honesty, integrity and perseverance
- Family engagement and enrichment
- Teamwork and collaboration
- Innovation and entrepreneurship
- Commitment to community
- Mentoring
- Volunteerism

## *2018 – 21 Program Goals*

---

- Strengthen race cities and increase participation by racers and race communities through personnel development and communication.
- Drive overall Derby engagement through educational opportunities.
- Further extend the core mission into Derby communities with events.
- Select and honor those who have left an indelible mark on the program by their accomplishments or contributions to the Soap Box Derby.
- Enhance the Soap Box Derby brand and participation, and build community, spectator and media interest through effective communication of the organization's mission and programs.
- Set strategies that grow and diversify the fiscal resources of the Soap Box Derby to support the overall budget and ensure the ongoing financial health of the organization.
- Manage resources effectively and provide sufficient oversight to ensure long-term sustainability and adherence to sound fiscal policy..
- Advance governing excellence through the structure, policies and procedures used by ISBD's Board.

# All-American Racing Program

*Responsibility:* Competition Committee

*Major Programs and Activities:* Rally Program, Local Program, All-American Race

*Goal:* Strengthen race cities and increase participation by racers and race communities through personnel development and communication.

*Objectives:*

*Objective 1:* Develop technology aides to help new racers accelerate their learning curve resulting in improved “out-of-the-box” competitiveness.

*Objective 2:* Initiate an R&D program for critical race components such as wheels, shells, and axles and ensure control of intellectual property.

*Objective 3:* Develop a Race Director training and development program as part of our “Standards of Excellence” effort to support directors in delivering the ISBD mission consistently including training, background checks, and creating a certification program to support Objective 3 in Management and Operations.

*Objective 4:* Evaluate changes to 'race week' to meet or exceed participant expectations while supporting attendance growth.

*Year 1 Priorities: (Oct. 2018 – Sept. 2019)*

- Develop requirements for director development and training.
- Develop tech aids plan and begin deployment.
- Ensure fair and honest competition.



# Education Programs

*Responsibility:* Education Committee

*Major Programs and Activities:* STEM Education Curriculums, GRC Racing Programs, Summer Camp

*Goal:* Drive overall Derby engagement through educational opportunities.

*Objectives:*

*Objective 1:* Create and implement an education business plan by end of 2018 Q3 addressing organization recommendation, sales plan including sales channels for the various products (camps, mini-cars, curriculum etc.), P/L forecast, local race city engagement, integration into race week and seed funding.

*Objective 2:* Expand and strengthen the education committee to include internal and external expertise to achieve Objective 1.

*Objective 3:* Identify satisfaction level of users of STEM educational programs and potential new ventures.

*Objective 4:* Create added value for all users (student and teachers) of STEM educational programs.

*Objective 5:* Create additional pathways for all users of STEM educational programs to their local races.

*Objective 6:* Create plan around GRC races and qualifications for national championship.

*Objective 7:* Maintain and expand selling of STEM education curriculum.

*Year 1 Priorities: (Oct. 2018 – Sept. 2019)*

- Complete educational programs Strategic Planning including all requisite surveying and brainstorming sessions.
- Expand and strengthen the education committee to include internal and external expertise.

# Community Connections

*Responsibility:* Community Connections Committee

*Major Programs and Activities:* Community and Public Events, Competitive Racing Events, Private Events

*Goal:* Further extend the core mission into Derby communities with events.

*Objectives:*

*Objective 1:* Develop a comprehensive plan for Community Connections.

- Document P/L of existing community events for 2017 and forecast 2018 -2020 numbers.
- Develop a list of potential community events in addition to current successful events considering facility improvements necessary to attract and stage these events; P/L impact of these events; staff impact to attract, promote and stage events.

*Objective 2:* Build partnerships with organizations who can help grow and increase community events.

*Objective 3:* Update facilities and grounds to increase value of track rental and increase revenue in alignment with Management and Operations Objective 6.

*Objective 4:* Upgrade technology by purchasing software system for event registration, volunteer management, and donor database in alignment with Objective 5 in Management and Operations.

*Year 1 Priorities:* (Oct. 2018 – Sept. 2019)

- Develop a comprehensive plan for Community Connections.



# Hall of Fame

*Responsibility:* Hall of Fame Committee

*Major Programs and Activities:* Recognize leadership and honor contributions to the ISBD.

*Goal:* Select and honor those who have left an indelible mark on the program by their accomplishments or contributions to the Soap Box Derby.

*Objectives:*

*Objective 1:* Seek and select those worthy of recognition in the Hall of Fame category and for the President's Youth Volunteer Service award.

*Objective 2:* Seek opportunities to promote awareness and recognition of Hall of Fame inductees

*Objective 3:* Recognize the honorees and their achievements at the Soap Box Derby Museum.

*Objective 4:* Actively promote the recipients throughout the year in publications and promotional materials.

*Objective 5:* Examine and update the selection criteria and selection process.

*Year 1 Priorities: (Oct. 2018 – Sept. 2019)*

- Seek opportunities to promote awareness and recognition of Hall of Fame inductees.
- Examine and update the selection criteria and selection process.



# Marketing

*Responsibility:* Marketing Committee

*Major Programs and Activities:* Race Marketing, Education Program Marketing, Social Media

*Goal:* Enhance the Soap Box Derby brand and participation, and build community, spectator and media interest through effective communication of the organization's mission and programs.



*Objective 1:* Continue to support the Soap Box Derby's efforts to enhance the All-American event, including use of additional entertainment, social media, website, printed materials and public relations activities.

*Objective 2:* Tell the story of the Soap Box Derby via effective public relations efforts year-around, as well as prior to, during and following the week of the championship finals.

*Objective 3:* Market and build spectator interest in the FirstEnergy All-American Soap Box Derby by developing compelling reasons to attend the event via race day activities, including the competition itself.

*Objective 4:* Assist our "Standards of Excellence" effort with a local collaboration toolkit to be shared among current and prospective racing communities in alignment with Objective 3 in Management and Operations.

*Objective 5:* Develop and implement marketing campaigns for our Education and Community Connections Programs.

*Year 1 Priorities (Oct. 2018 – Sept. 2019)*

- Create and maintain an annual marketing plan and calendar.
- Continue adding new entertainment activities to the All-American event.

# Resource Development

*Responsibility:* Resource Development Committee

*Major Programs and Activities:* Sponsorships, Grants, Donations and Fundraising

*Goal:* Set strategies that grow and diversify the fiscal resources of the Soap Box Derby to support the overall budget and ensure the ongoing financial health of the organization.

*Objectives:*

*Objective 1:* Identify efforts, evaluate strategies, and present updates to Board.

*Objective 2:* Develop annual giving effort.

*Objective 3:* Enhance foundation support, locally and beyond with templates to help local race programs secure support.

*Objective 4:* Grow Corporate Derby Challenge.

*Objective 5:* Secure sponsorship for various program activities, such as the Local Challenge, Rally Challenge, and special events with focus on the \$50,000+ level.

*Objective 6:* Coordinate efforts with management efforts to develop and implement a capital improvement plan and campaign.

*Objective 7:* Consider securing support to accelerate competitiveness for underserved families that cannot otherwise afford extensive competition demands.

*Objective 8:* Initiate an effort to develop and implement a capital improvement plan and campaign.

*Year 1 Priorities: (Oct. 2018 – Sept. 2019)*

- Upgrade annual appeal and introduce “Derby Drivers” leadership giving effort.
- Identify, purchase and implement donor database.
- Establish one additional fundraising event and add value to existing events.
- Start securing grants outside Akron to assist locals and education program.





# Management and Operations

*Responsibility:* Executive Committee

*Major Programs and Activities:* Staff and Resource Management, Strategic Plan Implementation, Constituent Communications

*Goal:* Manage resources effectively and provide sufficient oversight to ensure long-term sustainability and adherence to sound fiscal policy.

*Objectives:*

*Objective 1:* Continually review and revise human resource policies, procedures and organizational structure to meet organizational needs.

*Objective 2:* Establish a succession plan including employee development in key areas with a focus on retention of current key employees.

*Objective 3:* Establish a “Standards of Excellence” program that identifies a “success ladder” for race communities and participants that explains how our racing, education and community connections programs supports one another and results in a “toolkit” for use by Derby communities.

*Objective 4:* Evaluate current Regional Director business development model (“field” employees that support race cities, STEM etc.) to determine its effectiveness now and for the future.

*Objective 5:* Upgrade technology by purchasing software system for event registration, volunteer management, and donor database.

*Objective 6:* Oversee human resources policies including succession planning for key management positions and employee leadership development.

*Year 1 Priorities (Oct. 2018 – Sept. 2019)*

- Launch “Standard of Excellence” effort
- Update employee handbook and provide information to employees
- Initiate first look at capital campaign
- Select database software
- Identify critical positions/employees and develop a succession plan including employee development and retention

# Finance

*Responsibility:* Finance Committee

*Major Programs and Activities:* Annual Budgeting Process, Managing Revenues and Expenses, Overseeing Annual Audit and Required Financial Filings

*Goal:* Provide sufficient oversight to ensure long-term sustainability and adherence to sound fiscal policy.

*Objectives:*

*Objective 1:* Maintain a stable accounting department and an efficient system infrastructure to support the timely, accurate, and relevant reporting for decision makers.

*Objective 2:* Monitor and utilize cash flow efficiently and effectively to ensure a sustainable organization.

*Objective 3:* Establish a reserve fund of \$50,000, if possible, to cover one month of payroll in the short term; and work toward three-month cushion to protect the organization and prepare for future growth and expanded programs.

*Objective 4:* Work with the staff to review and recommend to the Board a realistic budget.

*Objective 5:* Maintain fiscally responsible segregation of duties and internal controls.

*Objective 6:* Diversify support and revenue streams to minimize risk and ensure long-term financial sustainability.

*Objective 7:* Continue striving for excellence for a clean and timely 990 filing and audit.

*Year 1 Priorities: (Oct. 2018 – Sept. 2019)*

- Establish reserve fund
- Review health care program

# Organizational Governance

*Responsibility:* Governance Committee

*Major Programs and Activities:* Strategic Planning and Organizational Oversight

*Goal:* Advance governing excellence through the structure, policies and procedures used by ISBD's Board.

*Objectives:*

*Objective 1:* Instill the 'cornerstone' belief of fair and honest competition' into everything we do.

*Objective 2:* Develop and enhance list of potential Board and Committee members to include diversity of talent.

*Objective 3:* Develop clear expectations for Board members including a strong orientation program and a 'Scorecard' to review performance.

*Objective 4:* Review our Code of Regulations and compare to current best practices.

*Objective 6:* Review the current committee structure and develop committee charters to ensure are all functions covered and that roles and responsibilities for oversight and staff support are clear.

*Objective 7:* Provide appropriate oversight and support of the staff.

*Year 1 Priorities: (Oct. 2018 – Sept. 2019)*

- Increase Board diversity.
- Review Code of Regulations.

## Soap Box Derby Board

### Officers

- \*Gregg Mervis, Chair, President & CEO, Akron/Summit Convention & Visitors Bureau and John S. Knight Center
- Mark D. Mroczynski, Vice Chair, Executive Director, Transmission Reliability Enhancement Projects, FirstEnergy
- Alan Brubaker, Treasurer, Summit County Engineer
- Danyelle Sweitzer, Secretary, Human Resources Director, GPD Group

### Members

- Carole Berry, Administrative Manager, University of New Hampshire College of Engineering and Physical Sciences
- Michael Callahan, Senior Partner of Callahan, Greeven, Riley & Sinn, L.L.C.
- \*Bob Knapp, Retired Senior Vice President Signet Jewelers; Senior Advisor Patina Solutions Mentor Bank
- Bill Lowery, Retired President, Annaco
- Chris Ludle, Deputy Director of Public Service, City of Akron
- Guy Pipitone, Retired Senior Vice President, FirstEnergy
- Dominic Rizzo, Vice President and General Sales Manager, Rubber City Radio Group
- \*Kevin Thomas, Chair, Strategic Planning Committee and President & CEO, AAA Akron Auto Club
- Donald Visco, Professor of Chemical and Biomolecular Engineering, The University of Akron

### Honorary Board Members

- Bobby Cooper, Former Chair - Racing Commission
- Jack Engelke, Hindin/Owen/Engelke, Inc.
- William J. Ginter, Principal, Akron Legacy Group
- Brian Graham, Former Chair - Rally Commission
- Paul Jackson, Partner, Roetzel & Andress
- Bobby Nickoli, Derby Volunteer
- Marty Sullivan, Chair - Regional Directors
- Michele Tomer, Attorney
- Bob Troyer, Public Relations Consultant
- Thomas Welsh, Retired Senior VP, FirstEnergy

### Soap Box Derby Staff

- \*Mark Gerberich, President & CEO
- Kayla Albertoni, Race Programs Manager
- Duane Burkhammer, Kit Production
- Liz DeCarlo, Administrative Assistant
- Evan Gannon, Event Manager
- Jessica Gnata, Director – Australia
- Linda Hubbell, Education Program Director
- Cory Katzenmeyer, Marketing Manager
- Kim Kirkendall, International Business Development – China
- Heather Morrow, Operations Director
- Doreen Thorne, Marketing Director
- Jerry VanBuskirk, Shipping
- Cindi Zagar, Finance Director

\* Designates Strategic Planning Committee Member