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In 2017, Carnaval San Francisco engaged in a comprehensive, strategic planning process for the years of 2018 to 2022. The purpose of the plan is to take Carnaval San Francisco from a mainly volunteer–run group to a professionally–staffed organization, with a complete Board of Directors, a sound organizational structure, its own 501(c)(3) nonprofit status, and to secure our first–ever facility. The team's decision to pursue a formal strategic planning process comes out of a recognition that, while the volunteer leadership team and a few professionals have shown incredible commitment and ability in producing Carnaval over the past six years, this structure and operation are not sustainable in the long term.

We aim to use this strategic planning process to identify our staffing needs, and how to best structure and fund staff positions to create an effective and sustainable organization. Furthermore, we will also highlight how Carnaval San Francisco impacts the Mission District community year–round through its support for artists’ access to jobs, the strengthening of local businesses, education of children, youth and community, advocacy, health and wellness and collaborations of other art institutions and beyond.

Upon achieving the goals set forth in the strategic plan, Carnaval San Francisco will demonstrate its sustainability as an organization contributing to the successful production of multicultural events in the Bay Area. Carnaval San Francisco will be able to:

- Articulate a clear and compelling story of impact to funders.
- Market itself regionally, nationally, and internationally.
- Strengthen its organizational structure to improve program and operational work.
- Complete a positive and productive succession planning process and usher Carnaval’s next generation of leadership.
- Achieve a more diversified revenue portfolio.
- Enhance its role as a leading organization for advocating for and helping local artists secure spaces to showcase Latino and Caribbean music, dance, and culture to national and international audiences.
INTRODUCTION

The San Francisco Bay Area gave birth to various political and social movements from the 1960s to the 1970s. Some included the Black Panther Party, the Gay Rights Movement, the Hippie Era, the Native American Resistance, and the Chicano Movement. Carnaval San Francisco was conceived through that spirit of communal love, social justice, and cultural resistance. All races and ethnicities—Latino, Caribbean, African American, Asian, Caucasian, Native American—congregated around Precita Park in the Mission District in February 1979 to celebrate the very first Carnaval in San Francisco.

Carnaval San Francisco grew from a 500-participant parade to five thousand dancers, drummers, and spectators in 1980 at Dolores Park, where the artists moved to have enough space to welcome everyone who wanted to join this new, multicultural tradition. The word about Carnaval spread like wildfire in neighborhoods across the Bay Area. In 1981, the organization moved to San Francisco's Civic Center. Although Carnaval was a success wherever it nested, it was brought back to the heart of the Mission District. In 1985 Carnaval settled on Harrison Street on Memorial Day weekend.

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The organizers of Carnaval San Francisco took it upon themselves to beautify Harrison Street with the city by removing the railroad tracks, paving the street, adding sidewalks between 20th Street and 16th Street, planting trees and painting an iconic mural of Carnaval on a PG&E wall. At last our Carnaval San Francisco had found a place to call home that welcomed luminaries like Celia Cruz, the Neville Brothers, SANTANA, Oscar de León, and Los Lonely Boys, to give life to the Carnaval festival on Harrison Street.

OUR STORY

The San Francisco Bay Area gave birth to various political and social movements from the 1960s to the 1970s. Some included the Black Panther Party, the Gay Rights Movement, the Hippie Era, the Native American Resistance, and the Chicano Movement. Carnaval San Francisco was conceived through that spirit of communal love, social justice, and cultural resistance. All races and ethnicities—Latino, Caribbean, African American, Asian, Caucasian, Native American—congregated around Precita Park in the Mission District in February 1979 to celebrate the very first Carnaval in San Francisco.

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Even though Carnaval found its home in the Mission, it has never owned an actual brick-and-mortar space; instead, it has always been a project of other Latino organizations. With the Mission District now being one of the most expensive neighborhoods in the country, finding a space to continue to plan and produce our year-round programs has and continues to pose a challenge to the organization. The Comparsas (parade dance contingents), for example, are the artistic backbone of Carnaval, and they have been struggling to keep their traditions alive under the high costs of living in the Bay Area. Without our own facility we cannot support the Comparsas with rehearsal, meetings, and workshop spaces for costume-making and float building. If Carnaval does not find a place in the next five years, it will run the risk of never holding a place of its own in the Mission District.

Along with the rise in rent prices in the Mission, a significant, demographic change has come to the neighborhood. Over 10,000 people have been evicted from the Mission District in the last 10 years, with 8,000 being Latinos. Not only has this affected Carnaval’s ability to attract volunteers, but it has also made a dent in its sponsorship opportunities because of the disappearing Latino-owned businesses that once supported the event. On a citywide level, the sponsorship and volunteer relationships on which Carnaval once stood have diminished over the years as blue-collar jobs and companies began to disappear from San Francisco and the greater Bay Area.
For the long-time residents of the Mission District, Carnaval is more than a celebration, it is a space where people reconnect with their roots, their language, and their families. Despite these organizational challenges, Carnaval continues to reaffirm and strengthen people's identities. The schools in the Mission District, for example, reinforce the Carnaval spirit to the children and youth by providing culturally-appropriate lessons through the Cultural Arts and Health Education Program.

The Carnaval Cultural Arts and Health Education Program is a project-based offering that introduces students to multicultural music, dance, theater, physical wellness, and visual arts traditions based on our annual Carnaval San Francisco theme. Since 2002, Carnaval has presented this program classes in 13 schools, serving over 9,000 students. The program specifically reaches out to under-performing schools in inner-city communities that were designated by the State and/or the District for targeted interventions designed to improve overall academic achievement. Carnaval has fought to instill the values of education, health and wellness, and cultural pride to the children and youth for decades.

Carnaval’s approach to healing the community has been through the practices of “La Cultura Cura,” or “Culture Cures” model. Our “Cultura Cura” model builds support systems for our community through spaces of traditional art, music, and dance. These support systems become part of a network of trust, social acceptance, economic reliance, and love. Carnaval practices a model of integration—it is one organization in a web of other Bay Area arts institutions such as the Mission Cultural Center for Latino Arts, Dance Mission, Bayview Opera House, Center for African Art & Culture, Malonga Casquelourd Center for the Arts, BrasArte, and Brava! For Women of the Arts. Through the healing power of culture, Carnaval and all of its partners change people’s lives by creating community, bridging cultures, and enriching the soul.

OUR IMPACT

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OUR VISION
We envision a world where harmony and revelry unite all people and where Latin American and Caribbean traditions and cultures are preserved and celebrated for generations to come.

OUR MISSION
Carnaval San Francisco cultivates and celebrates the diverse Latin American and Caribbean roots of the Mission District and the San Francisco Bay Area.

We accomplish our mission through dance, music, the visual arts and through creating spaces for community learning, school-based education, and advocacy.

OUR VALUES
We value:
• Our interconnectedness through art and family
• Strong, artisanal businesses in our community
• Collaborative, cross-cultural relationships
• The healing power of cultural connection, re-connection, and reclaiming
• The intersection between art and activism
• The importance of revelry in a spiritual context
• The power of volunteerism
THEORY OF CHANGE

Background: Given Carnaval’s volunteer nature and culture, programmatic fluidity, and broad array of programs and services, it is crucial for the organization to establish a theory of change that can bring a more visible “container” for all of what the organization does, who it does its work for, how it impacts its community of users, customers, etc., and what its long-term impacts are on the Mission community and beyond.

The organization will engage in the creation of its first theory of change in 2018. Depending on policy and political environment, funding trends, and levels of financial reserve, Carnaval may be able to take up deeper, strategic planning efforts that include theory of change and matrix map as products from it.

Priority Statement A

By December 31, 2018, Carnaval San Francisco will have developed a fully articulated theory of change and a formal matrix map to guide its growth, sustainability, and mission impact.

Strategy A1 – To better measure mission impact and financial sustainability of every activity Carnaval carries out, it will complete its formal matrix map by December 31, 2018.

Strategy A2 – To illustrate how Carnaval transforms lives it will complete its theory of change by August 31, 2018.

AFFORDABLE ARTS SPACE

Background: The lack of access to affordable space for artists is an issue that directly impacts Carnaval San Francisco. In the last decade, hundreds of artists have left the Mission District because of the high cost of property. For the last ten years, Carnaval SF itself has struggled to provide consistent, high-quality programming because of the scarcity of artists in our neighborhood and the lack of space.

Priority Statement B

Carnaval San Francisco will play a major role in retaining existing arts spaces and in the creation of new arts spaces in the Mission and beyond.

Strategy B1 – Carnaval will convene arts and culture organizations interested in advocating for arts spaces in the Mission District.

Goal a – Create a partnership with the Mission Economic Development Agency to develop a plan for arts spaces in the Mission District

Strategy B2 – Carnaval will convene a public-private partnership comprised of City agencies, nonprofits, businesses, and think tanks interested in providing housing opportunities for artists in the Mission.

Goal a – Create a partnership with the Mission Economic Development Agency and other relevant entities and individuals to develop a plan for artist housing the Mission District

Goal b – Partner and collaborate with District 9 Supervisor Hillary Ronen and city departments to create housing for artist in the Mission
CULTURAL ARTS & HEALTH EDUCATION PROGRAM

Background: The Carnaval Cultural Arts and Health Education Program was inaugurated as a pilot program at Flynn School in the Mission District in 2002. Flynn's demographics included 68% Latinos (many being English Language Learners) and 16% African Americans. Working with numerous teachers, CSF offered drumming and dance classes at Flynn, seeking to increase student involvement in the arts and to prepare students to participate in the 2002 Carnaval Parade. As the program progressed, parents became involved in costume making, float building and volunteering for the program. Teachers reported that parents who had rarely visited their child's school before became enthusiastic participants in the Carnaval SF education project. Since 2002, Carnaval has presented the program classes in 13 schools, serving over 9,000 students.

Priority Statement D

By December 2020, the Carnaval Cultural Arts and Health Education Program will expand and serve 10 underperforming schools in the Mission District.

Strategy D1 – Carnaval will strengthen partnerships with local schools and teachers in the Mission District to promote the implementation of Carnaval curriculum.

Goal a – Organize and manage relationships with school principals, parent-teacher associations, and art directors

Goal b – Design and implement a partnership with the San Francisco Unified School District and District 2 PTA that will result in the identification of financial and human resources for the program

Strategy D2 – Carnaval will connect with and attract artists in the fields of music, dance, theater, and visual arts to become part of its Cultural Arts and Health Education program.

Goal a – Develop a directory of artists who are able to and can become authorized to teach at the elementary and middle school levels

COMPARSAS

Background: The Comparsas (parade dance contingents) are the heart and soul of Carnaval San Francisco. Their yearly participation in our programs—Mardi Gras Fat Tuesday, Royalty Competition, Cultural Arts & Health Education Program, Grand Parade, and Festival—has helped Carnaval achieve its mission for 40 years. It is imperative that Carnaval find a more sustainable and systematic way to better support the Comparsas.

Priority Statement C

Carnaval San Francisco will support Comparsas through organizational development resources and financial assistance.

Strategy C1 – Carnaval SF will increase Comparsas’ capacity in fundraising, volunteer recruitment, fiscal sponsorship opportunities, and program management.

Goal a – Create a management plan that outlines all the dates and deliverables of the workshops

Goal b – Develop social media and technology workshops to strengthen the Comparsas’ online presence

Goal c – Create fiscal sponsorship prerequisites

Strategy C2 – Carnaval will raise initial funds for Comparsa professional development.

Goal a – Develop a fundraising plan for and with Comparsas

Goal b – Create a system to manage the disbursement of funds

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FUND DEVELOPMENT

PLANNING

Background: Cultural festivals such as Carnaval SF, Juneteenth, SF Pride, and Chinese New Year bring in millions of dollars in revenue to San Francisco, yet San Francisco fails to support these celebrations in a way that results in them becoming financially sustainable. Although the City provides some support to Carnaval on an annual basis, at least half of such financial support goes to paying permit fees from over a dozen City departments, making this vicious cycle one that does not facilitate growth and self-sufficiency. Instead, this cycle perpetuates dependency. There should be a more transformational system in place to encourage growth and financial stability while being more equitable in terms of how all nonprofit, multi-cultural festivals receive support citywide.

Priority Statement E

Carnaval will leverage this year's 40th Anniversary theme to attract “seed capital” and supporters to create a special, infrastructure-building fund.

Strategy E1 – Carnaval will design and launch a special “40th Anniversary” campaign to attract new and existing sponsors, donations, and grants, including one–time gifts, to establish a fund aimed at, among other needs, facilitating the growth and professionalization of the board and the inception of a new, paid executive director position and facilities.

Goal a – Update sponsor deck to reflect new tie–in rights and benefits
Goal b – Develop and implement initial, individual donor program
Goal c – Develop an initial corporate employee donor matching program
Goal d – Create partnerships with technology companies

PORTFOLIO DIVERSIFICATION

Priority Statement F (Pre–40th Anniversary)

After the 40th Anniversary and based on levels of success, Carnaval will pursue multi-year funding from public sector, foundations, business sector, and individuals to further grow and stabilize its new staffing pattern.

Strategy F1 – Create a fund development plan with specific goals and timelines for diversifying revenue sources by September 30th of 2018.

Goal a – By December 31, 2018, Carnaval’s board and executive staff will have created a new, draft, individual donor and corporate sponsorship plan
Goal b – Develop and implement an initial donor base program
Objective I – Conduct initial outreach to individuals, local organizations, small businesses, corporate and technology employees
Goal c – Develop an initial, corporate support program
Objective I – Research potential, corporate and technology company sponsors
Objective II – Identify corporations and technology that are targeting multicultural market
Objective III – Identify corporate and technology Company that have an employee matching program
Goal d – Research foundations that can co–fund the implementation of strategic and business plans
Objective I – Strengthen relationships with past funders
Objective II – Research and develop list of funders

Strategy F2 – While continuing to advocate for equitable financial and in-kind support from the City of San Francisco, Carnaval will maintain and grow its current partnership with the City.

Goal a – Participate in the City's interdepartmental Outdoor Events Task Force to advocate for a more equitable system for nonprofit organizations
Goal b – Partner with the City of San Francisco to identify corporate and technology support

BUSINESS MODEL

Background: Carnaval San Francisco is at a phase in its development that requires a leap into a more sustainable operation. This leap can only be taken through a point of inflection that will make it possible for its supporters to re–invent the infrastructure. Our point of inflection is to adopt a new business model. This new business model, however, will continue to leverage Carnaval's diverse and inclusive nature as a means for broader revenue streams in areas such as donors, grants, sponsorships, and city support.

Carnaval San Francisco’s new business model:

Rooted in Latin American and Caribbean artistic traditions and supported by a combination of volunteers, institutional grants, donations, in–kind contributions, corporate, and sponsorships, Carnaval San Francisco creates spaces for music, dance, advocacy, and learning.

Priority Statement G (Post–40th Anniversary)

Carnaval will grow through increased in–kind contributions, foundation support, technology company and corporate sponsorships and the creation of an individual, donor program aimed at funding the initial, paid staff positions necessary to create and maintain a self–sustaining operation. This growth projection begins with 40th anniversary activities in 2017—2018 and it continues through 2020.

FINANCIAL MANAGEMENT & OPERATIONS

Priority Statement H

By December 31, 2018, Carnaval will have established stronger financial systems and structures to measure, monitor, and adjust financial sustainability goals.

Strategy H1 – Carnaval SF will engage the services of a part-time accountant to strengthen existing and set up new, financial management systems.

Goal a – Develop an accounting system by December 31, 2017

Strategy H2 – Carnaval SF will develop a business plan.

Goal a – Engage a consultant to develop a Business Plan with financial projections

Strategy H3 – Carnaval SF will develop an operations plan.

Goal a – Engage consulting assistance to develop an initial Operations Plan for Festival, Parade, Volunteer, and special events

FACILITIES

Background: Carnaval SF has never had a brick-and-mortar space to formally call its own. For forty years, it has been housed by several nonprofit organizations in the Mission District. Carnaval needs a formal space for staff, a conference room to hold community meetings, rehearsal space for artists to practice, sew costumes and build floats.

Priority Statement I

Carnaval San Francisco will work with the City of San Francisco, non-profit housing developers, private developers, and local nonprofits to find a permanent facility that will include office, rehearsal, storage, and costume–making space.

Strategy I1 – Research current spaces being built for arts organizations in the Mission District and secure the purchase of, at minimum, office space by 2019.
GOVERNANCE & SUCCESSION PLANNING

Background: Like many arts organizations, the Carnaval Board of Directors has never quite established a consistent and strong fundraising infrastructure. Our priority, therefore, is to build a board that will network on behalf of our mission and generate a stable portfolio of diverse revenue sources.

The new Carnaval Board of Directors will be comprised of a combination of 9 to 15, long-term community supporters with historical knowledge and affiliation to Carnaval's mission, local and key public-sector officials who can help navigate City and County bureaucracy, technology people, philanthropists, merchant community, corporate representatives that support Carnaval, and celebrities or show business individuals with the power to connect outside resources and visibility to Carnaval's already strong brand. The first year of Board service will be focused on attracting new financial resources, overseeing infrastructure-building, aligning and integrating programmatic direction, supervising the new executive director, and overseeing fiscal management.

Carnaval's Board of Directors will also establish and implement a succession plan for its Executive Producer. The timeline of this transition plan is directly tied into Carnaval's current Executive Producer's departure date. A year prior to the Executive Producer's departure date, the board of directors will have a fully-recruited board and sufficient financial reserves to hire a new, full-time executive director, and some level of staffing for production and operations purposes.

It is possible that the new, governing board will need Carnaval's current Executive Producer to serve as a board member for at least a year after his departure to continue to help connect the board and

Priority Statement J

By December 31, 2018, Carnaval's Board of Directors will grow to become a governing body populated by a team of nine (9) to fifteen (15) dedicated individuals from diverse socioeconomic, professional, and occupational backgrounds and focused on growing Carnaval's infrastructure for long-term, financial sustainability and consistently high, organizational, mission impact.

Strategy J1 – Carnaval will recruit five (5) new board members by December 31, 2017 and four (4) additional board members by September 30, 2018.

Strategy J2 – Carnaval will engage in board development activities between January 1 and December 31, 2018

HUMAN RESOURCES

Background and Available Options: Given the length, breadth, and depth of tenure of current Carnaval Executive Producer (EP) it will take nine (9) months to a year to successfully transition into the new, Executive Director (ED) position and organizational culture shift. This transition period will help the organizational members separate from their current, long-tenured, and well-regarded Executive Producer in a thoughtful, healthy and paced manner and to fully prepare for the arrival and on-boarding of Carnaval’s first-ever Executive Director.

While Carnaval will create a much-needed, funded, staffing structure, volunteerism is an organizational core value and a good portion of the work of Carnaval will always include volunteers carrying out the labor of love it has always been.

Priority Statement K

Carnaval's Board of Directors will establish and implement a succession plan for its Executive Producer that will result in the eventual hiring of Carnaval’s new Executive Director. The timeline of this transition plan is directly tied into Carnaval’s current Executive Producer’s departure date.

Strategy K1 – By August 30, 2018, Carnaval SF will have designed the most appropriate Executive Producer transition method to result in the inception of and hiring of a new Executive Director.

Strategy K2 – By October 30, 2018, Carnaval SF will have created, and its Board will have adopted, a new, Executive Director job description.

MARKETING, PUBLIC RELATIONS, & BRANDING

Priority Statement L

By December 31, 2020, Carnaval San Francisco will be recognized nationally and internationally as one of the premier Latin American and Caribbean arts and education organization showcasing year-round, Carnaval-themed programming in the United States. Through our marketing plan and public relations strategies, funding institutions in the United States and abroad who are dedicated to supporting Latin–American and Caribbean arts and education programming will recognize Carnaval as a beacon of multicultural celebration.

Strategy L1 – By December 31, 2019, Carnaval SF will have completed, and begun implementation of, a marketing plan to accomplish its marketing, PR, and branding priority L.

Goal a – Establish dedicated capacity for marketing, PR, and branding
Goal b – Build new partnerships with Latin American and Caribbean Consulates
Goal c – Create relationships with Departments of Culture and Tourism throughout Latin America and the Caribbean
Goal d – Develop a marketing and PR team
Goal e – Strengthen our communication and technology systems
Goal f – Grow our social media team
Goal g – Partner with SF Travel – Convention & Visitors Bureau to create plan and implementation
Goal h – Partner with the Calle 24 Latino Cultural District to promote cultural events
PLANNING PROCESS OVERVIEW

Carnaval San Francisco appointed a Strategic Planning Committee from its board and all stakeholders from the Mission District, which began work in April 2017. There were seven initial meetings between April and September 2017. During the first three meetings, the Planning Committee identified eight critical issues in the organization’s future. Subsequent meetings consisted of researching internal and external views on such critical areas, summarizing input and views of such areas, and writing potential directions for the seven areas where Carnaval needed strengthening and strategizing. Input and feedback on versions of such writing were solicited and obtained from all internal members and all stakeholder communities surrounding Carnaval San Francisco.

Once a draft of our strategic plan document was created, we put it through a series of reviews and refinements, involving the Strategic Planning Committee, San Francisco Unified School District teachers, artist organizations, community–based organizations, city agencies, technology companies, and multiple, community focus groups. Our six focus groups included one for local merchants, one for parade dance contingents, one for the Carnaval production team, and three for Mission District residents. The Strategic Planning Committee met again in October 2017, reviewing the final report from the consultant and further writing, re-writing, editing, and refining priority and strategy language, and mission, vision, and values statements.

Carnaval San Francisco’s final strategic plan for 2018—2022 was adopted by our board of directors in November 2017.

Carnaval San Francisco’s eight (8) priorities areas for 2018—2022 include: Programs; Fund Development & Operations; Business Model; Financial Management & Operations; Facilities; Governance & Succession Planning; Human Resources; and Marketing, Public Relations & Branding.

AFTERWORD BY EXECUTIVE PRODUCER ROBERTO HERNANDEZ

Carnaval San Francisco has contributed to the fabric of the Mission District and the San Francisco Bay Area’s identity for four decades, and the goal of this strategic plan is to continue that tradition for years to come. In a time when the fast displacement of people due to gentrification has led to a disappearing culture in the Bay Area, Carnaval San Francisco stands as a beacon of hope for the preservation of the Latino and Caribbean traditions and the creation of a new, more inclusive American culture.
ACKNOWLEDGEMENTS

Carnaval San Francisco wishes to thank the following individuals and entities:

**Strategic Planning Committee**
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Elizabeth Soberanes, Master Dancer, Choreographer
Giuliana Blasi, Carnaval SF Parade Contingent Member
Goretti Campbell, San Francisco Women in Tech
Laura Fraenza, Amado’s Business
Luis Granados, Executive Director, Mission Economic Development Agency
Moisés García, Calle 24 Latino Cultural District
Nubia Mendoza, San Francisco Department of Emergency Management
Peter Balogh, Law Office of Peter Balogh
Peter Gallegos, P&A Realty
Regina Galloway, Master Dancer, Choreographer
Roberto Hernandez, Executive Producer, Carnaval San Francisco
Rodrigo Durán, Parade Director, Carnaval San Francisco
Staci Powers, Executive Director, Braval for Women in the Arts
Sylvia Ramirez, Multi-Media Consultant

**Consultant**
Alfredo Vergara-Lobo, Principal at Vergara-Logo Associates

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Burning Man
Calle 24 Latino Cultural District
Valencia Street Merchants Association
Mission Merchants Association
Mission Creek Merchants Association
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Supervisor Hillary Ronan
San Francisco Entertainment Commission
San Francisco Unified School District
Carnaval San Francisco Comparsas
Carnaval San Francisco Production Team

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