

FREEDOM WITHIN PROJECT

STRATEGIC PLANNING RETREAT SUMMARY

MAY 3RD & 4TH, 2025

IN ATTENDANCE: Malcolm Dydo, Kirsten Pohlman, Jay Saber, Marcel Manzardo, Michael Erkiletian, Dave Klaus; Facilitators – Robin Callahan & Gail Rothman, The Callahan Collaborative

RETREAT FOCUS: The retreat focused on answering the question, *“What needs to happen in the next 3-5 years to move us closer to our vision of transforming justice by moving beyond punishment to repairing, healing, and thriving?”*

INTRO: Dave and Malcolm started the retreat with an inspiring welcome, housekeeping details and a check-in, then introduced facilitator Robin Callahan with The Callahan Collaborative. Group commitments were established, and Robin provided an overview of the following two retreat days.

SOAR SESSION REVIEW: The group reviewed and discussed the key takeaways areas from the SOAR Session on 2.11.25.

Strengths -*What do we do well? What sets us apart? What are we known for? Which of these are most important to build on in the upcoming three years?*

- Inside lead and co-facilitators
- Building a sense of community and belonging (family)
- Facilitator handbook and curriculum, and training
- Weekend intensive at Folsom

Opportunities - *What are the opportunities for growth, expansion, pivoting or impact? Which of these are the most important to capitalize on in the next three years?*

- We are able to deliver our curriculum to more participants and possibly in other prisons
- Inside facilitation, identifying, training, and empowering inside facilitators (intrinsic motivation, don't do it for the payment)
- Diversifying funding streams. Grants are primary funding source currently.
- Increasing the size of the board
- Develop strong re-entry arm within the organization
- Bring an individual who is incarcerated onto our board or on an advisory board

Aspirations- *What do we care deeply about? What are our most compelling ideas? What strengths do we want to add? Which of these are most important to strive for?*

- Develop a facilitator training program for those on the inside and on the outside

- Have more inside facilitators in more facilities like San Quentin
- Build a sustainable organization with a strong cash reserve
- Increased donor base, develop a database
- Improved social media FB and IG through increased capacity
- Quarterly newsletters, up to date e-news distribution list

Results- *What would success look like? What meaningful measures would indicate that we are on track? What do our stakeholders expect? Which of these are most important?*

- 6-9 months of operating expense as a cash reserve
- Develop a comprehensive system by which we can measure and track outcomes.
- Expand to 4 facilities in the next 3- 5 years. a women's facility. Double in next 10 years, possible expansion to other states.
- Fully staffed and engaged board - full participation
- Develop common, human-centered language
- Long-term business and development plan (3 years or more)

KEY STAKEHOLDER FEEDBACK: The group reviewed the report of Key Stakeholder Feedback by stakeholder group and discussed its implications for the strategic plan. See FWP Stakeholder Survey Report 4.27.25 for the complete report.

Past FWP Board Members

Expansion and Leadership Development: Urgent need to train new facilitators (both people who are incarcerated and those who live outside the prison) to expand reach and sustainability. Greater focus on empowering individuals who are currently or formerly incarcerated as leaders and Board members.

Program Sustainability: FWP is perceived as over-reliant on a few key individuals; recommendations include hiring administrative **support and professional fundraising consultants.**

Communication: Quarterly email updates and impact storytelling on emerging platforms like Bluesky were encouraged.

Success Metrics: Success should be measured by participant growth, facilitator recruitment, post-program outcomes, and broader curriculum deployment across facilities.

Governmental Agencies & Policy Makers

Key Metrics: Recidivism reduction and developing self-aware, help-seeking individuals are critical outcome measures.

Policy Needs: Address barriers caused by penalizing laws for felons; expansion to reach more participants is encouraged.

Challenges in Reintegration: Stigma, unhealthy social environments post-release, and need for strong support systems were highlighted.

Opportunities for Advocacy: Partnerships with legislators and possibly engaging with victim advocacy groups were suggested to advance policy change.

Correctional Administration & Staff

Program Benefits: FWP creates an authentic, healing container rarely seen in correctional settings. The adaptive, individualized approach was highly praised.

Policy Alignment: Caution about perceived "over-familiarity," but acknowledged FWP's proactive communication helps mitigate concerns.

Challenges: Cultural resistance within CDCR, frequent staff turnover, and administrative barriers threaten program consistency and expansion.

Program Improvements: Suggestions included adding modules on victim awareness, grief work, and written affirmations for participants to boost positive reinforcement and emotional healing.

Staff Collaboration: Building casual rapport with staff and maintaining transparency are essential for growing acceptance.

Freedom Within Participants

Most Impactful Elements: Shared experiences across diverse backgrounds and conflict resolution skills were transformative.

Barriers: Group cohesion (due to participant turnover) was noted; otherwise, no major barriers were noted while incarcerated.

Skill Use After Release: Participants report deep, lasting change, using emotional intelligence tools daily for personal and professional success.

Additional Support Needs: Desire for ongoing men's groups or emotional support networks post-release.

Community Member Feedback

Program Impact: Participants develop emotional resilience, hope, and genuine transformation, which also positively affects broader communities.

Expansion Desires: Calls for broader availability nationwide and more post-release support, including check-ins and group sessions.

Public Awareness: Strong encouragement to use social media, podcasts, and grassroots outreach to amplify visibility and support.

Trauma and Emotional Intelligence: Acknowledgement that emotional healing is rare and essential, with hopes that Freedom Within programs continue to grow to address systemic trauma beyond incarceration.

Community-based Organizations & Service Providers Serving Incarcerated Populations

Complementary Services: FWP is seen as deeply aligned with other organizations' rehabilitative and introspective missions.

Collaboration Opportunities: Pre-release referrals and joint celebratory events are suggested to strengthen partnerships.

Participant Needs: Focus on healing, access to safe communities, and sustained support after release.

Resource Sharing: Requests for periodic updates and continued strong communication between agencies.

Co-Facilitator and FWP Past Facilitators

Effective Curriculum Components: Crossroads process, mirror exercises, emotional exploration, and creating a safe space were the most praised elements.

Delivery Challenges: Institutional mistrust and administrative obstacles were significant challenges.

Improvements Suggested: Ongoing adaptation of methods based on participant feedback; continued facilitator development through workshops and constructive feedback.

Resource Needs: Training workshops and financial support were noted as essential for strengthening facilitator capacity.

NOTABLE KEY TAKEAWAYS

Sustainability & Expansion: New facilitator development, administrative capacity building, and fundraising infrastructure are urgent needs.

Cultural & Institutional Barriers: FWP must continue its uphill work against correctional culture resistance while maintaining its integrity and participant-centered approach.

Post-Release Support: Stakeholders across categories urge expansion of post-release services like mentorship groups and emotional support networks.

Visibility & Outreach: Freedom Within should amplify storytelling through podcasts, social media, and broader community engagement strategies.

Partnership Building: Stronger alliances with legislative advocates, community organizations, and facility staff can support growth and influence.

PRACTICAL VISION: This session was intended to help clarify what Freedom Within Project's vision of "of transforming justice by moving beyond punishment to repairing, healing, and thriving" would look like. The framing question for this section of the retreat was, *"What do we want to see in 3-5 years as a result of our actions?"*

The group was asked to imagine what the Good Times headline might read in 2034 if they were coming to do a story on FWP. "What are some of the highlights that we would want to share? What are some shining demonstrations of FWP's accomplishments?" The responses:

- FWP is known nationwide
- FWP has support groups for families of incarcerated individuals
- FWP has bilingual programming
- We have served 2,000 incarcerated individuals in the last 10 years
- Participants have a low rate of recidivism vs. general population
- FWP is in 10-15 prisons
- FWP sets the model for peer-led facilitation
- We have changed the culture inside prison
- FWP serves one women's prison in CA
- FWP is a thought leader in the space e.g. a TED Talk

Using Stakeholder Feedback and the "Opportunities, Aspirations, and Results" sections of the SOAR Analysis, individuals brainstormed their top 10-12 ideas and paired up in groups of 2 to choose the 7-8 ideas they had in common. Each group presented their ideas, which were grouped by common accomplishments. Together, the group determined what the cluster of accomplishments represented. The group determined that over the next 3-5 years, what they wanted to see in place was:

- Increased/expanded impact
- A strong and sustainable organization
- Increased funding
- Increased visibility
- Data-driven evidence re: outcomes

PRACTICAL VISION: Framing Question: What do we want to see in 3-5 years as a result of our actions?

Responses from the Practical Vision Session on 05.03.25

Increased/Expanded Impact	A Strong and Sustainable Organization	Increased Funding	Increased Visibility	Data Driven Evidence re: Outcomes
Support group, both in-person and Zoom, for weekly support for families of incarcerated people	Fully developed board	Funding: Sponsors, Fundraising, Funding Streams	Outreach/Community engagement	Robust, academic, evidence-based study
Bilingual/Bicultural curriculum delivery and website	Fully renumarated career facilitators with benefits, including retirement	Corporate/Foundation Sponsorship and Endowment	Media presence and national profile	Support metrics and data
Facilitator training and 10 trained facilitators	An elected official as a champion and a paid lobbyist	Statewide trainings and facilitators	Ted Talk	Robust, academic, evidence-based study
A reentry program that includes a facility and/or job training and placement business	A culture that is nimble and agile and can seize opportunities for growth	Position ourselves to financially benefit communities and organizations	Community awareness and impact- Ted Talk, print ads	
Expanded facilitation team, including trainers and portable curriculum	Long-range planning to recognize and identify small contributions/investments that have significant impact in the future			
5 peer-led programs				

Strategic Partnerships				
An elected official as a champion and a paid lobbyist				
Position ourselves to financially benefit communities and organizations				

UNDERLYING CONTRADICTIONS: *"What is blocking us from Moving Toward our Vision?"* The group spent the next hour and a half finding the patterns, structures, perceptions, or attitudes that hinder progress toward the vision. Robin shared that underlying contradictions are at the heart of an organization's impediments to change. They reveal patterns and assumptions that are important to understand as the organization crafts ways to move forward effectively.

Using Key Stakeholder Feedback, the group individually brainstormed and then paired up to share ideas, looking for common ideas. Each group presented their top 7-8 ideas, which were grouped by common themes. Together, the group determined the root cause of each cluster of obstacles and named the pattern that is standing in the way of achieving the vision.

Robin shared that naming the real problem is the key to finding a solution. Like a dandelion, the root needs to be dug out or the dandelion will continue to pop up. The group determined that the underlying contradictions are:

- Unbalanced representation on the Board and Staff
- Scarcity mindset
- Unrealistic expectations of board and staff
- Outdated social media and communication strategies
- Insufficient fundraising structure
- Inconsistent support from CDCR
- Fragmented communication and feedback

UNDERLYING CONTRADICTIONS: Framing Question: What is blocking us from moving toward our vision?

Responses from the Underlying Contradictions Session on 05.03.25

Unbalanced Representation on Board and Staff	Scarcity Mindset	Unrealistic Expectations of Board and Staff	Outdated Social Media and Comms Strategy	Insufficient Fundraising Structure	Inconsistent Support from CDCR	Fragmented Communication and Feedback
Board not diverse	Scarcity mindset - we can't pay staff what they deserve	If something needs doing, the ED is the person to do it	Social media absences: How to make FWP noticeable (people leaving SM)	Insufficient development strategy	Cultural resistance in CDCR and General to the work we do (right-wing propaganda)	Are we using feedback to guide and craft programs?
Incarcerated individuals can't participate at board meetings	We only have four facilitators - why?	Geographic constraints of facilitators	No newsletters	Underutilized database	Prison admin does not care about the incarcerated - think they are not worth it	Belief that intra-board communication is sufficient
Board energy and capacity to tackle these issues	Fundraising attempts- people don't want to fund prison work	ED should have a broad, unlimited skillset	Social media is covered sufficiently	No donor communication or stewardship	CDCR admin staff are overburdened or incompetent and unable to provide programmatic support	
Recruitment of board members who we know create a culture that lacks diversity of thought/opinion	FWP revenue is limited to only grants					
Incarcerated mean are	The money					

predominantly of color, and we only have white middle-aged men as facilitators	from the grants will run out, and we will be volunteers again					
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DAY 2

STRATEGIC DIRECTIONS: Robin shared that there is a world of possibilities and a nearly infinite number of things an organization can do to actualize its vision. The “strategic directions” provide a realistic framework that allows an organization to focus on its movement toward its vision. However, the primary focus should be on the contradictions rather than the vision to keep strategies related to the actual situation rather than a future that does not yet exist. As discussed earlier, this is because the underlying contradictions are at the heart of the impediments to change. They reveal patterns and assumptions that are important to understand as the organization crafts ways to move forward effectively.

Robin asked each person to review the ideas from the Practical Vision and Underlying Contradictions and identify 10-12 innovative, substantial actions in the next 2-3 years that would deal with the underlying contradictions and move FWP toward its vision. **She shared that actions include Programs, Projects, Initiatives, Events, Activities, Plans, Enterprises, Ventures, Systems and Models.** She also shared that strategic thinking requires a variety of thinking styles – thinking proactively (like a chess champion), bold and conservative thinking (like a yin/yang), catalytic thinking (like a bowling ball), and persistent thinking (like the 108 tries required for the Wright Brothers first flight).

The group brainstormed individually, paired up, and shared ideas, looking for identified actions in common. Each group presented their top 7-8 actions, which were then clustered by common intent. Together, the group determined what the cluster of actions would accomplish and tagged it, beginning with a verb, e.g., Increase Staff Engagement and Development.

The group looked for which two or three clusters had a similar intent and named the “strategic directions.” They determined that the critical strategic direction was “Optimizing Organizational Effectiveness,” followed by “Growing our Impact”, and lastly, “Mobilizing Community Support and Engagement.”

STRATEGIC DIRECTIONS: “What innovative, substantial actions in the next 2-3 years will deal with the underlying contradictions and move us toward our vision?”			
Optimizing Organizational Effectiveness	Hiring Professionals to Optimize Effectiveness <ul style="list-style-type: none"> Vet professionals better Grant writer, Fundraiser, Influencer? 	Strengthening & Diversifying the Board <ul style="list-style-type: none"> Invite diverse Board members 	Embodying a Strategic Culture <ul style="list-style-type: none"> Find appropriate starting points (priorities)

	<ul style="list-style-type: none"> Engage a grant specialist for compliance reporting Hire a fundraising guru Hire a consultant to evaluate program efficacy 	<ul style="list-style-type: none"> Identify, recruit additional Board members with needed skill sets All Board members go inside Develop an elevator pitch for Board members 	<ul style="list-style-type: none"> Identify positive linchpin items (what one action may address other items) Establish a system to create goals, timeless benchmarks, with accountability. Project: feedback, interpret use, share data Establish strategic partnerships - work smarter, not harder Calendar plan - Sac, Soledad this year. San Quentin next year, Colorado Chowchilla the year after
Growing Our Impact	Expanding Programmatic Impact <ul style="list-style-type: none"> Implement support group for families Produce statewide training event Appoint / hire Director of re-entry support 	Leveraging Strategic Partnerships <ul style="list-style-type: none"> Appoint / hire Director of re-entry support. Establish strategic partnerships - work smarter, not harder Connect with CBOs in communities outside SC Implement a support group for families Connect with colleges with criminal justice majors. Internships & guest speaking spots 	Strengthening Curriculum <ul style="list-style-type: none"> The rewrite, edit, and print of the curriculum and facilitator handbook Develop the facilitation training Complete facilitator training manual, find a facilitator, hold trainings
Mobilizing Community	Engaging the Community & Raising \$\$	Telling Our Story <ul style="list-style-type: none"> Profile (collect) participant stories 	

Support & Engagement	<ul style="list-style-type: none"> • Plan/execute community engagement event • Social events, speaking engagement, and fundraising events • Focus & time-driven messaging and fundraising drive. • Complete website development & donation page set up • Produce statewide training/awareness event • Develop a database 	<ul style="list-style-type: none"> • Develop podcast interviews • Elevator pitch for what we do with FWP • Videotape a graduation ceremony • Develop a TED Talk! • All Board members go inside • Produce statewide training / event 	
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FOCUSED IMPLEMENTATION: The group then split into work groups by strategic direction. Within each strategic direction, the group discussed the current reality, the three-year success indicators (how will the group know in 2028 if they have been successful), and the specific, measurable, attainable, realistic accomplishments for year one; when those will take place, and who is responsible for them.

Each group presented the information that came from their in-depth group discussion.

#1 Optimizing Organizational Effectiveness

Current Realities:

- Engaging grant specialist (Lauren)
- Increase diversity on the Board
- Need to establish systems
- 2 Board members need to go inside
- Need to grow board intentionally

Three-Year Success Indicators:

- A diverse Board of X to provide the skill set needed to grow the organization
- 9-to-12-month operating reserve
- Leadership succession plan for key staff

- Dashboard of key metrics (what do we measure & why)
- We have embodied a strategic culture
- Long-term (3 years) business projection growth plan

First-year Accomplishments:

- Engagement of a grant specialist for compliance for current grants & to write future grants
- All Board members will go inside at least once
- Identify missing board member sets & diversity
- Board calendar with strategy meetings (program calendar)
- Contracted fundraiser working on our behalf
- Glossary

#2 Growing our Impact

Current Realities:

- Limited re-entry support
- The curriculum is close to being finished, but needs a week to finish
- Four facilities, four facilitators

Three-Year Success Indicators:

- Develop an effective re-entry infrastructure (practical & emotional support) through leveraged partnerships
- Develop facilitation training to bring others inside
- Develop a business model by which we monetize our curriculum and training
- Establish meaningful measures of program efficiency
- Support group for families of incarcerated individuals

First-Year Accomplishments:

- Complete curriculum and facilitators handbook QTR. 2 - 2025
- 4 Groups in 3 facilities with 4 facilities, June Qtr. 4
- Develop a facilitator training TBD Qtr.1-Qtr.2

#3 Mobilizing Community Support & Engagement

Current Reality:

- Website incomplete
- No formal fundraising except grant writing, no events, no agreed-upon elevator pitch
- Few public-ready stories
- Some video but need more

Three-Year Success Indicators:

- Community engagement event
- Digital impact stories of men who are outside, and with positive stories to tell
- Board members are equipped to be effective ambassadors on behalf of FWP (as indicated on Board Survey)
- Effective & efficient database

First-Year Accomplishments:

- Website completion, donation page (PayPal)
- All Board members go inside (need 2 2-month window for approval)
- Build out a database, using an expert to create a database, or using our existing website backend
- Marketing & communication strategy

FIRST-YEAR TIMELINE: Each team identified timelines and ownership (Responsible in the RACI Matrix) for each first-year accomplishment to develop the 2025 Strategic Action Plan. Team members placed the actions on a yearly calendar, answered questions, and then adjusted based on dependencies between items and the workload of those responsible.

WRAP-UP: Robin provided strategies that will give the most significant ROI for the invaluable investment of time from this thoughtful group of FWP leaders and stakeholders.

- Refine the 2-3 year success indicators to ensure they are specific, measurable, attainable, and realistic. If this is not something you already measure, developing a 2024 baseline is essential to show growth and that your strategy and specific actions produce the intended outcome.
- Keep the 2025 Strategic Action Plan front and center. Use color-coding to update it. Review it quarterly with the Board.
- Use this 2025 Action Plan to justify saying “no” to other suitable opportunities. There is an opportunity cost associated with every decision we make by saying “yes”.
- Use the retreat conversations and data already gathered as the basis for an annual retreat in early Q4 of 2025. Determine what, if anything, has changed that impacts your objectives and strategies. Review and celebrate your accomplishments, and determine which potential actions from your list should be included in the 2026 Work Plan. Realistically, this can be a 4-hour retreat.

COMMITMENTS: Everyone was invited to share one or two words they were feeling and a commitment they were willing to make to move this work forward.

- Robin: Excited, inspired
 - Commit to a one-week turnaround summary
 - 10 Days for strategic planning

- Marcel: Grateful to learn about board workings
 - Website done (live) within one month
- Dave: Grateful & relieved
 - Committed to editing curriculum by June
- Kristin: Supported by RC & new board
 - Board skillsets by August
- Malcolm: Grateful
 - Not to overcommit
- Jay: Optimistic
 - Getting Michael and Marcell inside and continuing to move forward
- Michael: Excited, grateful
 - Making sure this plan happens
- Gail: Impressed
 - Use experience for any client
 - Help promote forward

Attachment 1

Focus Implementation - FY25 Work Plan

First Year Timeline, Responsibility

Strategic Directions	Quarter 2 April through June	Quarter 3 July through September	Quarter 4 October through December	Quarter 1 January through March	Quarter 2 April through June
Optimizing Organizational Effectiveness	Board calendar w/ Board dates (Marcel)	Glossary (Kirsten)			
	Engage grant specialist for compliance (Malcolm)	Grant writer for future grants (Malcolm)			
	Update the budget (Michael, Malcolm, Accountant)	Contract with a fundraiser (Malcolm and Robin)			
	All board members go inside (Jay)				
		Identify missing Board member skill sets & diversity (Kirsten & Robin)			
Growing Our Impact	Complete curriculum & facilitator handbook (Jay / Malcolm/Dave)		Develop & deliver advanced (3-4 day) facilitator training (Jay deliver in Q2 2026)		
		Develop & deliver a 1 day introductory facilitator training (Dave)			
		Job description for key staff (Malcolm/Robin)			
Mobilizing Community Support & Engagement		Marketing & community strategy (TBD Board Member)			
		Build out database (Fundraising/ Malcolm)			
	4 Groups in 3 facilities June - Q4 (Malcolm/Jay/Scott/Dave)				
	Website complete (Marcel/Malcolm)				