



OVERARCHING CARVER GOAL: “To Define & Provide an Excellent Carver Client Experience”

1. Develop and approve Model of Excellence to be known as “The Carver Way” by September 30, 2018: identify best practices that can be applied consistently across the organization and inform the way Carver staff work together and interact with all stakeholders including clients, donors, and community partners.
 - a. Evaluate the performance of each Carver organizational activity against the best practice criteria by December 30, 2018.
 - b. Diagnose and develop a plan, timeline and owner/s to improve the performance of each organizational activity to meet the best practice criteria by January 31, 2018
2. Identify building projects by capturing staff, client, and board voice and develop a schedule of implementation by October 15, 2018. Complete all projects by June 30, 2019.
3. Diagnose existing IT infrastructure and develop a plan to streamline data management, information sharing, and internal/external communications through capturing the staff/board voice by November 15, 2018. Complete improvement plan by March 31, 2019.
4. By September 1, 2018 develop an all-encompassing, intentional, and targeted fundraising strategy for the following revenue categories: Unrestricted; Restricted; Events. The strategy should also include a plan to meet the following objectives:
 - a. Donor segmentation analysis to better understand: current and potential donor demographics, entity type, communication preferences, Carver-related interests, and what opportunities exist to increase engagement.
 - b. Retention and engagement of 75th Anniversary Gala attendees
 - c. Development of a Carver “Circle of Friends” or similar mechanism to offer top donors recognition and specific, unique opportunities that appeal to top donors’ interests.
5. Create a plan for deeper and more robust volunteer experiences by November 1, 2018 to support a variety of objectives, such as:
 - a. Support and enhance Carver programming in alignment with Carver’s mission
 - b. Enhance Carver facilities in alignment with the overarching goal to improve the client experience
 - c. Create meaningful volunteer opportunities for donors and potential donors (as per donor segmentation analysis).
 - d. Increase Carver’s visibility within the community; create interesting PR opportunities.
6. By August 15, 2018 create a purposeful marketing strategy with actionable plans to support the following objectives:
 - a. Enhanced Carver Awareness and Brand Recognition
 - b. Increased Program Participation
 - c. Acquiring additional resources- monetary, human capital, and reputational capital

7. Improve Financial Controls with appropriate performance monitoring for all departments.
 - a. Develop new budget format and present to the Finance Committee by August 30, 2018
 - b. Update Financial Policies to include any new operational context and progress monitoring language by September 1, 2018.
 - c. By September 30, 2018, leverage Carver's finance function to provide Carver directors with the necessary education and support to understand program-/ area-specific budgets under management and identify operational efficiencies.
8. By December 31, 2018 develop program dashboard that can be shared with board to provide insight into program-specific performance.
9. Expand client voice work initiated in FY18 for all five Learning Benchmarks.