

OBJECTIVE	DETAILS	OWNERS	TIMING	STATUS - 11/08/2018	SCHEDULE
DEVELOP TARGETED 3-YEAR FUNDRAISING STRATEGY	1. 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.	Lead: Anne Bradner, CEO & Incoming Chief Advancement Officer Partners: • Board of Directors • Development Committee • Karissa Payero, Development Coordinator	30-Jun-19	<ul style="list-style-type: none"> Developed a database of qualitative information about Carver's top donors with recommendations and nominations for "Circle of Friends". Developed a Restricted Contributions database to organize Carver's grant opportunities. Started donor segmentation analysis work. Developing a strategy specific to annual benefit. Creating a plan to engage 75th anniversary donors. Plan to reach out to donors in a personalized way for second wave of annual appeal. Second round of key donor transition meetings underway (introductions to Anne) for donor continuity. 	ON SCHEDULE
CREATE MORE ROBUST VOLUNTEER EXPERIENCES	2. Create a plan for deeper and more robust volunteer experiences 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.	Co-Leads: Gina Nocco, Director of Talent & Incoming Chief Advancement Officer Partners: • Development Committee • Program Committee	31-Mar-19	<ul style="list-style-type: none"> Gina has created a presentation outlining existing current volunteer opportunities and presented to the Program Committee on November 5. Staff has reviewed and diagnosed current volunteer status utilizing the volunteer efforts rubric. 	ON SCHEDULE
CREATE PURPOSEFUL MARKETING STRATEGY	3. 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	Lead: Anne Bradner, CEO Partners: • Marketing Committee • Incoming Marketing & Events Director	31-Mar-19	<ul style="list-style-type: none"> Marketing has been identified as one of our Leadership Circle's next priorities. We are focused on identifying our next Marketing & Events Director, who will lead this process with the support of our Marketing Committee. 	ON SCHEDULE
IMPROVE FINANCIAL CONTROLS	4. Improve Financial Controls with appropriate performance monitoring for all departments. a. Develop new budget format and present to the Finance Committee. b. Update Financial Policies to include any new operational context and progress monitoring language. c. 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.	Lead: Anne Bradner, CEO Partners: • MGroup- Mike and Arlete • Finance Committee • Leanne Tormey, Chief Learning Officer, and Alex Chavarria, Chief Business Officer, to lead progress monitoring	On-going	<ul style="list-style-type: none"> A comprehensive FY2019 budget was developed and approved by the board at the September 20 meeting. Financial policies have been updated to reflect all new operational procedures and have been approved by the board of directors. Key staff will be convening monthly to review their respective budgets. We have identified some areas where internal practices are not consistent with our financial policies. We are working to ensure that we are compliant with our updated policies. 	ON SCHEDULE

AS OF: 11/08/2018
 AHEAD OF SCHEDULE /
 ON SCHEDULE/ BEHIND
 SCHEDULE

OBJECTIVE	DETAILS	OWNERS	TIMING	STATUS - 11/08/2018	
IDENTIFY BUILDING PROJECTS	5. Identify building projects by capturing staff, client, and board voice and develop a schedule of implementation. Complete all projects by June 30, 2019.	Lead: Alex Chavarria, Chief Business Officer Partners: • Leadership Circle • Environment Task Force • Incoming Chief Advancement Officer	On-going	• Carver's Leadership Circle has done several interactive exercises to identify key building projects and has developed a short-term plan for implementation. A task force of various key staff has been developed to drive the work forward. • Developing a strategy to obtain client and board voice on potential building projects.	ON SCHEDULE
COMPLETE IT IMPROVEMENT PLAN	6. Diagnose existing IT infrastructure and develop a plan to streamline data management, information sharing, and internal/external communications through capturing the staff voice. Complete improvement plan.	Co-Leads: Alex Chavarria, Chief Business Officer and Milton Garcia, IT Coordinator Partners: • Sharon Devasia, Director of Systems and Information • Leadership Circle • Information Systems Task Force	31-Mar-19	• Information Technology has been identified as one of our Leadership Circle's next priorities. The Leadership Circle has developed and refined an Excellence Rubric for this area which will drive a comprehensive workplan. This was presented to the full staff on 10/11.	ON SCHEDULE
DEVELOP PROGRAM DASHBOARD	7. Develop program dashboard that can be shared with board to provide insight into program-specific performance.	Lead: Leanne Tormey, Chief Learning Officer Partners: • Program Committee	30-Jun-19	• This is a priority for the Program Committee. The Committee has discussed the format of a program dashboard and has a draft template.	ON SCHEDULE
EXPAND CLIENT VOICE WORK	8. Expand client voice work initiated in FY18 for all five Learning Benchmarks.	Lead: Leanne Tormey, Chief Learning Officer Partners: • Program Committee	On-going	• A monthly calendar of opportunities to capture the client voice has been established and is being employed.	ON SCHEDULE
DEVELOP AND APPROVE MODEL OF EXCELLENCE	9. Develop and approve Model of Excellence to be known as "The Carver Way": 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. b. Diagnose and develop a plan, timeline and owner/s to improve the performance of each organizational activity to meet the best practice criteria.	Lead: Leanne Tormey, Chief Learning Officer Partners: • Leadership Circle • Full Staff	1-Apr-19	• Carver Center staff is systematically moving through a series of rubrics. To date, the following rubrics have been reviewed and Carver's status has been diagnosed: "Environment"; "A Community of Professionals"; Systems & Information. • We continue to identify components of the organization for diagnosis. • As rubrics are utilized, task forces are established to identify immediate and long-term action plans.	ON SCHEDULE