

OBJECTIVE	DETAILS	OWNERS	TIMING	STATUS - 02/01/2019	
DEVELOP TARGETED 3-YEAR FUNDRAISING STRATEGY	<p>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:</p> <p>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.</p> <p>b. Retention and engagement of 75th Anniversary Gala attendees</p> <p>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.</p>	<p>Co-Leads: Colleen Kane, Chief Advancement Officer & Anne Bradner, CEO</p> <p>Partners:</p> <ul style="list-style-type: none"> • Board of Directors • Development Committee • Karissa Payero, Development Coordinator 	30-Jun-19	<ul style="list-style-type: none"> • Colleen Kane, Carver's new Chief Advancement Officer, commenced work in January 2019. • The second wave of annual appeal (using a personalized approach) and foundation fundraising strategies has been initiated. • The 2019 Spring Benefit strategy is underway. We are focused on retention of 75th Anniversary Gala attendees and are leveraging our donor segmentation analysis. • Carver's "Circle of Friends" is in the final phase of planning and is expected to debut in April 2019. 	ON SCHEDULE
CREATE MORE ROBUST VOLUNTEER EXPERIENCES	<p>2. Create a plan for deeper and more robust volunteer experiences to support a variety of objectives, such as:</p> <p>a. Support and enhance Carver programming in alignment with Carver's mission</p> <p>b. Enhance Carver facilities in alignment with the overarching goal to improve the client experience</p> <p>c. Create meaningful volunteer opportunities for donors and potential donors (as per donor segmentation analysis).</p> <p>d. Increase Carver's visibility within the community; create interesting PR opportunities.</p>	<p>Co-Leads: Gina Nocco, Director of Talent & Colleen Kane, Chief Advancement Officer</p> <p>Partners:</p> <ul style="list-style-type: none"> • 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. • A task force, made up of a cross section of staff members, has been established to identify short and long term strategies to create more meaningful volunteer opportunities. This group meets weekly and is preparing an updated presentation for March. • Board member Brian Stern is working with staff to pilot an interactive family engagement experience for March 2019. • Volunteer engagement opportunities were offered to stakeholders invited to the benefit kick-off event in January. 	ON SCHEDULE
CREATE PURPOSEFUL MARKETING STRATEGY	<p>3. Create a purposeful marketing strategy with actionable plans to support the following objectives:</p> <p>a. Enhanced Carver Awareness and Brand Recognition</p> <p>b. Increased Program Participation</p> <p>c. Acquiring additional resources - monetary, human capital, and reputational capital</p>	<p>Co-Leads: Anne Bradner, CEO & April Langus, Marketing Director</p> <p>Partners:</p> <ul style="list-style-type: none"> • Marketing Committee 	31-Mar-19	<ul style="list-style-type: none"> • April Langus was hired as Carver's Marketing Director and began work in late January 2019. April will lead this process with the support of our Marketing Committee. 	ON SCHEDULE
IMPROVE FINANCIAL CONTROLS	<p>4. Improve Financial Controls with appropriate performance monitoring for all departments.</p> <p>a. Develop new budget format and present to the Finance Committee.</p> <p>b. Update Financial Policies to include any new operational context and progress monitoring language.</p> <p>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.</p>	<p>Lead: Anne Bradner, CEO</p> <p>Partners:</p> <ul style="list-style-type: none"> • 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. • The Carver staff has examined and is updating all rental contracts, certificates of liability insurance. 	ON SCHEDULE

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IDENTIFY BUILDING PROJECTS	5. Identify building projects by capturing staff, client, and board voice and develop a schedule of implementation.	Lead: Alex Chavarria, Chief Business Officer Partners: • Leadership Circle • Environment Task Force • Incoming Chief Advancement Officer	On-going	<ul style="list-style-type: none"> 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. An Environmental Task Force has been developed and has presented to staff to recommend priority projects. A Security Task Force of staff, board members and community advisors has convened, met and accomplished short-term projects. Emergency repairs to boiler and hot water heating system have been completed (restoring hot water to building and heat to 2nd floor). Repairs to pump for 1st floor heating pump are underway as of 1/30/19. We will need to identify a working group to explore short and long term capital needs at Carver. 	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	<ul style="list-style-type: none"> 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. Carver's new phone system has been implemented and a new sound system for the multipurpose room has been installed. 	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	<ul style="list-style-type: none"> This is a priority for the Program Committee. The Committee has developed a first draft of the Program dashboard, and staff are now evaluating the degree to which they have access to necessary data. Modifications are being made to ensure all data is available through the standard collection process. 	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	<ul style="list-style-type: none"> A monthly calendar of opportunities to capture the client voice has been established and is being employed. To date, client voice has been captured for the following programs: Fitness, Aquatics, Makerspace, Carver Market, Senior Programs, Citizenship Class, Adult English and CAP students. More to come via adherence to our calendar for capturing client voice. 	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	<ul style="list-style-type: none"> 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"; "Volunteer Efforts" and "Marketing". 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. The Learning Team has developed a new rubric for "Programmatic Excellence" and is in the process of applying it to each of the programs we run. 	ON SCHEDULE