

OBJECTIVE	DETAILS	OWNERS	TIMING	STATUS - 9/18/2019	STATUS - 11/13/2019	SCHEDULE
Carver's over-arching goal is to develop & adopt its model of excellence: The Carver Way	To inform Carver's 3-year strategic plan, identify best practices that guide how all stakeholders work with each other (staff, board, clients, donors & community partners). Create, diagnose and monitor rubrics for all areas of Carver organizational activity.	Lead: Leanne Tormey, Chief Learning Officer; Leadership Circle; Full Staff; Board of Directors	Ongoing. Present new rubrics by April 2020.	FY19 created and diagnosed Environment, Community of Professionals, Systems & Information, Volunteer Efforts, Marketing, Programmatic Excellence. Our work for FY20 is around monitoring and supporting progress for short and long-term plans. Other goals include developing rubrics for Human Resources/Staff Development and Facility.	Staff began work on the next rubric 11.14.19	On Schedule
Develop a board excellence rubric for The Carver Way	Create, diagnose and monitor a rubric to address Board of Directors' activities and development. Consider nominating process, annual evaluation, attendance at events and more.	Leader: Claire Diesen Steinberg; Board Committees and support from senior staff leadership	Ongoing. Present new rubric by April 2020.		Work not yet started.	On Schedule
Develop & approve a 3-year strategic plan to implement The Carver Way through June 2023	Knitting together the results from each organizational goal, create a written 3-year plan that outlines Carver's goals for excellence in all areas: programming, advancement, finance, facility, governance and operations.	Leads: Anne Bradner, CEO; and Claire Diesen Steinberg, President, Board of Directors. All professional staff; board members and input from other stakeholders	June 30, 2020		Work not yet started.	On Schedule
Create an infrastructure assessment, form ongoing vendor relationships, and develop a written plan to maintain an excellent facility with appropriate security at 400 Westchester Avenue	Identify long-term and short-term building projects by capturing staff, client and board voice. As part of the 3-year plan, create a schedule and budget for implementation.	Lead: Anne Bradner, Chief Executive Officer; Board Facility Committee (Rich Lawrence); Environment and Facility Task Forces	January 15, 2020	Monitor new IT relationship (external vendor) and create long-term plan.	Work not yet formally started. Discovered a 2016 engineering report on Carver's heating system. Working to identify volunteer and professional assistance for committee.	Behind Schedule
Continue Targeted Fundraising Strategy including long-term funding for CAP (Carver After Program) and Facilities and to inform 3-year planning	Build on the plan developed in FY19 to increase revenue from all sources.	Lead: Colleen Kane, Chief Advancement Officer; Board Advancement Committee (Jim Howland and Amy Fisch, Co-Chairs); Stakeholders in excellence work for Marketing and Volunteerism	Ongoing with written plan completed by March 30, 2020.	Plan presented in June 2019 serves as foundation for this goal.	FY20 fundraising is going well to date which will lead to development of robust plan for future years.	On Schedule

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Ensure that volunteerism supports program excellence; builds brand awareness and assists fundraising goals	Using and expanding upon the rubric of excellence developed in FY19, incorporate volunteerism fully in all Carver planning. Evaluate volunteer experiences and metrics to focus efforts on the most productive volunteer engagement activities.	Lead: Gina Nocco, Director of Talent with all staff and board committees	Create written plan by April 30.	Share volunteer statistics with board in FY20; create a clear path for board and others to volunteer; incorporate volunteerism to re-invigorate teen dance fundraiser.	While new volunteer groups have been working actively at Carver Center in fall 2019, we have not begun the formal work on our rubric.	On Schedule
Improve financial management to promote excellent oversight of Carver's financial activities and progress	Ensure that the new contract with M Group and upgraded relationship with Prime Pay meet Carver Center's needs; monitor Carver's financial progress and cash-flow with transparency; create the budget for FY21 by spring of 2020; establish succession for treasurer; participate in 3-year planning; create strategies to pay off credit line while supporting Carver Center's programs & facility.	Lead: Anne Bradner, Chief Executive Officer; Rob Kost, Board Treasurer; Finance Committee; Navy Djonovic, Principal at M Group	Ongoing.		New contracts and systems are underway; prospective new treasurer has been identified.	On Schedule
Use program dashboard and client voice work as a decision-making tool when evaluating program plans	Populate the program dashboard created in FY19 to inform the board and staff. Continue client voice work initiated in FY18 for all five learning benchmarks and weave it into excellence work with intentionality. Use the dashboard as a decision-making tool in evaluating program success and 3-year planning.	Lead: Leanne Tormey, Chief Learning Officer; Program Committee (Jen Prather, Chair); Programmatic Excellence Task Force; Learning Team Staff	Ongoing.		Ongoing	On Schedule