Strategic Plan
2019–2022

Calmer Choice
Cultivating Awareness • Living Mindfully • Enhancing Resilience
Mission

The mission of Calmer Choice is to teach young people and community members to effectively and safely manage stress and resolve conflict so that they live happy, healthy and successful lives. As a research-supported prevention program, our goal is to provide skills that will diminish the risk of violence, substance abuse, and other self-destructive behaviors.

Vision

Calmer Choice envisions a world in which people lead lives of kindness and compassion towards themselves and others.

I love Calmer Choice because I really enjoy learning about my brain and to pay attention to my breath. I use my finger breathing when I am upset or angry. It helps me calm down. It was one of my favorite times during school.

– Finn, age 7

The Transition from Adolescence to Maturity as an Organization

In the Fall of 2018, as Calmer Choice entered its ninth year of operation as a prevention program delivering research-supported secular mindfulness curriculum to schools and communities on Cape Cod, the organization embarked on a strategic planning process, led by Executive Director Fiona Jensen, consultant Virginia Sullivan and Development Manager Emily Smalley. Engaging Calmer Choice’s leadership and staff, the team began a process of developing a three year-strategic plan, charting the course for the organization as it prepared to enter its second decade of serving children and families.
The Framework

The framework for the process was provided by vetted research called “The Organizational Lifecycle of Nonprofits.” We found this research useful as it allowed for assessment of the organization from guided direction and questions associated with key areas of the business, and provided a common language to discuss not only the operational shift but the culture shift that would be required to allow Calmer Choice to grow from “adolescence” to “maturity.” It also allowed for conversations about leadership that removed the emotional charge that often happens when the founder and/or leadership team feels threatened or undervalued.

Goals

Two key questions emerged that guided the organization, staff and Board of Directors through this process:

1. How can we continue to be a vital service to our community?
2. How can we sustain our current momentum as we approach our 10-year anniversary?

After a thorough SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis, reflection and guided work, we sought to develop a strategic plan that allowed us to reach three overarching goals, which would enable us to progress from an adolescent organization to a mature organization and secure our future as a valuable resource for the residents of Cape Cod and beyond.

1. Optimize the program and operations coordination internally
2. Integrate technology and data management throughout the organization
3. Driven by the Board of Directors working with the Executive Director, develop a plan for long-term financial sustainability
Strategic Action Areas & Plan at a Glance

The categories for our strategic plan are:

**Programming**

We believe that programming is the heart of our organization. We have developed two strategic initiatives for programming that have a corresponding work plan for the programming department.

**Goals:**
1. Launch Updated Calmer Choice Curriculum
2. Develop and Pilot a Model for the Calmer Choice Institute

**Leadership, Management, Staffing and Operations**

We believe that the efficiency and effectiveness of our organization requires focused leadership, daily management and a staffing and operations plan to fully support programming.

**Goals:**
1. Professionalize Management and Staffing of Calmer Choice
2. Improve Operational Excellence at Calmer Choice
3. Improve Internal and External Communication at Calmer Choice

**Board Governance and Finance**

We believe at the current stage of our organization, moving from adolescent to mature, we require a review of our current Board structure, a revisiting and strengthening of the Boards’ knowledge and relationship to the work of Calmer Choice, and a shared ownership by the Board working with the Executive Director and the organization to strengthen financial security.

**Goals:**
1. Improve Communication and Engagement with Board
2. Create and Execute Plan for Financial Sustainability
Programming

GOAL 1: Launch Updated Calmer Choice Curriculum

STRATEGY 1: Complete Curriculum for School and Community

**YEAR 1**
July 2019 – June 2020

- **PRE-WORK**
  - Create process, timeline, benchmarks and identify roles and responsibilities

- **GATHER FEEDBACK AND CONDUCT ASSESSMENTS**
  - Survey instructors, teachers and school partners
  - Assess our alignment to SEL frameworks and ACEs

**YEAR 2**
July 2020 – June 2021

- **USE IDENTIFIED OUTCOMES TO CREATE AND IMPLEMENT AN EVALUATION TOOL TO MEASURE OUTCOMES AND SUCCESS**

**YEAR 3**
July 2021 – June 2022

- **LAUNCH AND BEGIN USING UPDATED CURRICULUM WITH ALL SCHOOL AND COMMUNITY PARTNERS**

- **CURRICULUM REVISION AND UPDATE**
  - Create template format for each lesson
  - Review, edit and format every lesson

- **RESEARCH AND IDENTIFY OUTCOMES FOR PARTICIPANTS**

- **SUBMIT COMPLETED CURRICULUM FOR GRAPHIC DESIGN**

- **DEVELOP A SPEAKER SERIES FOR INCLUSION IN THE INSTITUTE – LIVE AND ON LEARNING PLATFORM**
## GOAL 1

### STRATEGY 2
Copywrite and Publish School Curriculum

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<tbody>
<tr>
<td>RESEARCH PROCESS AND COST FOR COPYWRITE AND PUBLICATION</td>
<td>DETERMINE GOALS OF PUBLICATION</td>
<td>HIRE COPYWRITE ATTORNEY AND PUBLISHER</td>
<td>WORK WITH ATTORNEY AND PUBLISHER TO ENSURE TARGET PUBLICATION DATE OF SEPTEMBER 2020 IS REACHED</td>
<td>COMPLETE PUBLICATION PROCESS FOR LAUNCH OF 2020-2021 SCHOOL YEAR</td>
<td>EXPLORE CURRICULUM DISTRIBUTION</td>
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</table>
GOAL 2: Develop and Pilot a Model for the Calmer Choice Institute

Serving three target groups: schools, community and targeted groups i.e. EMT, police, first responders, etc.

STRATEGY 1
Develop a Business Model for the Institute

**Year 1**
July 2019 – June 2020

- Define who is in each target group
- Determine revenue model and budget, including fees for service
- Identify “Existing, Exploring, and Never Before” partners
- Develop timeline for implementation

**Year 2**
July 2020 – June 2021

- Develop pilot strategy for implementation
- Create benchmarks for success

**Year 3**
July 2021 – June 2022

- Pilot the Calmer Choice Institute
GOAL 2

STRATEGY 2
Define, Refine and Implement Service Delivery Models for Schools, Community and Targeted Groups

**Action Steps**

**YEAR 1**
July 2019 – June 2020

- Support existing programs
- Explore interest for additional school-based programs
- Identify intentional alternate models of service (shorter, adaptable, etc.)

**FOR CALMER CHOICE IN THE CLASSROOM**

- For partners, define, refine and clarify training and implementation model

**FOR COMMUNITY AND SPECIALIZED, DEFINE MODEL AND TRAINING STRUCTURE**

- Continue to establish new relationships with schools, community and targeted groups

**YEAR 2**
July 2020 – June 2021

- Create alternate models of service

**IDENTIFY TARGET SCHOOLS, COMMUNITY ORGANIZATIONS AND TARGETED GROUPS FOR FIRST PILOT OF THE INSTITUTE IN JULY 2021**

**LAUNCH CALMER CHOICE INSTRUCTOR TRAINING AS A COLLEGE-LEVEL COURSE**

**YEAR 3**
July 2021 – June 2022

- PILOT THE CALMER CHOICE INSTITUTE
GOAL 2
STRATEGY 3
Develop Calmer Choice Online Services

**YEAR 1**
July 2019 – June 2020
- Explores options for online learning platforms, including hiring a consultant who specializes if needed.
- Determines and develops menu of online services, both fee-based and free.
- Develops business model and pricing structure for online learning platform.

**YEAR 2**
July 2020 – June 2021
- Develops pilot strategy for implementation.
- Creates benchmarks for success.
- Launches online learning platform as part of the Calmer Choice Institute.

**YEAR 3**
July 2021 – June 2022
- Develops model for training and supporting users of online platform, i.e., combination of in-person and distance training, mentoring program, etc.
- Develops promotional strategies for online services.
- Develops and implements an evaluation tool for online platform.
- Identifies online learning platform and works to generate, organize and upload all content.
- Reviews evaluations to continuously adjust and improve programs.
GOAL 1: Professionalize Management and Staffing of Calmer Choice

STRATEGY 1
Create more centralized management

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<th>YEAR 1</th>
<th>July 2019 – June 2020</th>
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<tbody>
<tr>
<td>Action Steps</td>
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<tr>
<td>RESTRUCTURE MANAGEMENT OF ORGANIZATION</td>
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<tr>
<td>DETERMINE AND IMPLEMENT OPTIMAL REPORTING STRUCTURE</td>
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<th>YEAR 2</th>
<th>July 2020 – June 2021</th>
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<tr>
<td>Action Steps</td>
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<tr>
<td>CREATE AND IMPLEMENT PERFORMANCE REVIEW STRUCTURE</td>
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<th>YEAR 3</th>
<th>July 2021 – June 2022</th>
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<tr>
<td>Action Steps</td>
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<tr>
<td>IDENTIFY 360 FEEDBACK PROCESS USING PROVEN PERFORMANCE EVALUATION TOOLS</td>
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<td>INCORPORATE 360 RESULTS INTO DEVELOPMENT PLAN FOR STAFF</td>
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GOAL 1

STRATEGY 2
Clarify Management and Staff Roles, Responsibilities and Training Needs

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<tr>
<th>YEAR 1</th>
<th>July 2019 – June 2020</th>
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<tr>
<td>REVIEW AND UPDATE JOB DESCRIPTIONS AND ROLES</td>
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<td>• Audit each person’s understanding of their job vs. job description and conduct GAP analysis</td>
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<td>REVISIT PERSONNEL MANUAL</td>
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<td>IDENTIFY TRAINING AND SUPPORT NEEDS</td>
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<th>YEAR 2</th>
<th>July 2020 – June 2021</th>
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<tr>
<td>EXPLORE CREATION OF STAFF PROFESSIONAL DEVELOPMENT PROGRAM</td>
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<td>IDENTIFY BUDGET NEEDS FOR PROFESSIONAL DEVELOPMENT PROGRAM</td>
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<td>IMPLEMENT PROFESSIONAL DEVELOPMENT PROGRAM</td>
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<th>YEAR 3</th>
<th>July 2021 – June 2022</th>
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<tr>
<td>REVIEW STAFFING NEEDS TO SUPPORT CALMER CHOICE AND BUDGET FOR EXPANSION</td>
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<tr>
<td>IDENTIFY NEEDS OF CALMER CHOICE TO UTILIZE CONSULTANTS TO ASSIST IN MEETING BUSINESS OBJECTIVES</td>
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<tr>
<td>IDENTIFY OPPORTUNITIES TO SHARE RESOURCES WITH OTHER NONPROFITS</td>
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GOAL 1
STRATEGY 3
Create robust professional volunteer program

**YEAR 1**
July 2019 – June 2020
- Identify roles that volunteers could fill
- Create job description for volunteer volunteer coordinator and identify reporting structure

**YEAR 2**
July 2020 – June 2021
- Assess volunteer coordinator role and volunteer structure and use
- Explore service enterprise and formal volunteer organizations as professional resources for utilizing volunteers

**YEAR 3**
July 2021 – June 2022
- Expand use of volunteers to include professional volunteer services as needed
- Determine ways to celebrate the contributions of volunteers based on knowledge of how they prefer to be recognized
- Assess gaps in needs and volunteer availability to consider in planning for next year
GOAL 2: Improve Operational Excellence at Calmer Choice

STRATEGY 1
Create standardized policies and procedures to support operations

| YEAR 1 | IDENTIFY AREAS WITHIN THE OPERATIONS OF CALMER CHOICE THAT NEED STANDARDIZATION AND PROCESS i.e. HR, payroll, bookkeeping, billing and receivables, technology, calendars, data management, etc. |
| YEAR 2 | CREATE ALL INTERNAL POLICIES AND PROCEDURES AND DEVELOP PROCESS FOR FEEDBACK AND APPROVAL |
| YEAR 3 | CONDUCT ONGOING ASSESSMENT OF POLICIES AND PROCEDURES |

BEGIN ROLL-OUT OF NEW POLICIES AND PROCEDURES
IDENTIFY STRUCTURE FOR OVERSIGHT AND ACCOUNTABILITY
REVIEW EFFECTIVENESS OF CHANGES AND ADJUST AS NEEDED
GOAL 2

STRATEGY 2
Identify technology solutions to support internal operations of Calmer Choice

**YEAR 1**
July 2019 – June 2020

- Identify areas that of operations that could be better supported by technology
  (which ideally coincides with areas identified above that need standardization)
- Evaluate how technology is impacting roles and responsibilities

**YEAR 2**
July 2020 – June 2021

- Conduct ongoing assessments on use of technology
- Review current tech solutions to determine upgrades needed

**YEAR 3**
July 2021 – June 2022

- Identify staff training needs re: technology
- Develop a plan to secure and pilot technology solutions
- Pilot new technology solutions
- Budget tech upgrades
- Re-evaluate technology training needs and fill in gaps
GOAL 2

STRATEGY 3

Improve data management

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<th>YEAR</th>
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<tr>
<td>YEAR 1</td>
<td>July 2019 – June 2020&lt;br&gt;IDENTIFY AREAS WITHIN THE OPERATIONS OF THE ORGANIZATION THAT RELY ON DATA MANAGEMENT, SUCH AS:&lt;br&gt;• Donor recordkeeping&lt;br&gt;• Internal file systems&lt;br&gt;• Accounting&lt;br&gt;• Billing&lt;br&gt;IDENTIFY TECHNOLOGY NEEDED TO ROLL-OUT NEW POLICIES AND PROCEDURES&lt;br&gt;IDENTIFY TIMELINE FOR ROLL-OUT</td>
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<td>YEAR 2</td>
<td>July 2020 – June 2021&lt;br&gt;CREATE ALL INTERNAL POLICIES AND PROCEDURES AND DEVELOP PROCESS FOR FEEDBACK AND APPROVAL&lt;br&gt;BEGIN ROLL-OUT OF NEW POLICIES AND PROCEDURES&lt;br&gt;IDENTIFY STRUCTURE FOR OVERSIGHT AND ACCOUNTABILITY</td>
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<td>YEAR 3</td>
<td>July 2021 – June 2022&lt;br&gt;CONDUCT ONGOING ASSESSMENT OF POLICIES AND PROCEDURES</td>
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GOAL 3: Improve internal and external communication at Calmer Choice

STRATEGY 1
Restructure staff meetings

**YEAR 1**
July 2019 – June 2020
- Develop calendar and agenda protocol for meeting and conduct post-meeting evaluations
- Staff meeting continue monthly in new structure

**YEAR 2**
July 2020 – June 2021
- Explore further staff training needs in meeting facilitation
- Assess effectiveness of meeting structure

**YEAR 3**
July 2021 – June 2022
- Continue to evaluate and restructure meetings, as needed
GOAL 3

STRATEGY 2
Create opportunities for continued collaboration between programming and leadership

YEAR 1
July 2019 – June 2020
- Generate list of opportunities for collaboration between programming and leadership
- Determine optimal communication strategy between BOD and leadership
- Identify accountability reporting structure to the board regarding strategic plan implementation

YEAR 2
July 2020 – June 2021
- Leadership begins to attend 1 program staff meeting per month
- Program manager and leadership meet regularly to evaluate and support working relationship toward the goals of the strategic plan

YEAR 3
July 2021 – June 2022
- Develop a plan to implement an annual all-day, all staff professional development session
- All staff attend at least one lesson of a community-based program per year
- All staff attend a target number of organization-wide events (Calmer Choice Annual Celebration, holiday party, etc.)
- All staff attend one school-based program lesson per year
- Continue with observation of staff at both community and school-based programs for continued education on what we do and how we do it
# Leadership, Management, Staffing and Operations

## GOAL 3

### STRATEGY 3

Create messaging and marketing strategy for all constituent groups

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<tr>
<th>Action Steps</th>
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<th>July 2019 – June 2020</th>
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<tr>
<td>DETERMINE ALL CONSTITUENT GROUPS WHO NEED TARGETED MESSAGING AND MARKETING i.e., donors, staff, community members, potential school and community partners, BAP, etc.</td>
<td>CONSIDER HIRING OUTSIDE CONSULTANT AS NEEDED TO CONDUCT NEEDS ASSESSMENT AND HELP DEVELOP PLAN</td>
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<tr>
<td>IDENTIFY TARGETED MARKETING STRATEGY FOR EACH GROUP</td>
<td>IDENTIFY AND CREATE MESSAGING AND MARKETING MATERIALS FOR EACH TARGET GROUP</td>
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<th>Action Steps</th>
<th>YEAR 2</th>
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<tr>
<td>DEVELOP PLAN FOR KEEPING MATERIALS UP-TO-DATE AND IDENTIFY ROLES AND RESPONSIBILITIES IN DOING SO</td>
<td>EXPLORE DESIGN OPTIONS WITH ONLINE LEARNING PLATFORM FOR CONGRUENCE WITH MESSAGING AND MARKETING STRATEGY</td>
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<th>Action Steps</th>
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<tr>
<td>DETERMINE RESOURCES NEEDED TO “BRAND” PRODUCTS FOR ONLINE CALMER CHOICE INSTITUTE</td>
<td>IDENTIFY MARKETING STRATEGY FOR NEW PRODUCTS AND SERVICES</td>
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Board, Governance and Finance

GOAL 1: Improve Communication and Engagement with Board

STRATEGY 1
Understand and leverage board member expertise and interest areas

**YEAR 1**
July 2019 – June 2020

- Meet individually with all board members to discuss interest and intentions ("TALENT SURVEY")
- Set expectations and targets for engagement (onboarding, give/get amount, 3x3, prospect introductions, event support, etc. – defining lanes)

**YEAR 2**
July 2020 – June 2021

- New board members are recruited to fill key voids in expertise and interest and to serve in committees where appropriate
- New board member onboarding process is introduced

**YEAR 3**
July 2021 – June 2022

- Conduct exit interviews with departing board members
- Annual individual meetings occur to survey progress and gather feedback
- Utilize exit interview information to strengthen board
GOAL 1

STRATEGY 2
Refine and solidify messaging for board to leverage with external audiences

**YEAR 1**
July 2019 – June 2020

PROGRAMMING TEAM TO HOLD EDUCATION AND MESSAGING DISCUSSIONS AT BOARD MEETINGS AS NEEDED

**YEAR 2**
July 2020 – June 2021

PROGRAMMING TEAM CONTINUES TO HOLD EDUCATION AND MESSAGING DISCUSSIONS AT BOARD MEETINGS AS NEEDED

**YEAR 3**
July 2021 – June 2022

UTILIZE CALMER CHOICE AMBASSADORS TO DEVELOP OPPORTUNITIES FOR CALMER CHOICE IN THE COMMUNITIES WE SERVE

CREATE PR KIT FOR EACH BOARD MEMBER, TO INCLUDE:
- Student/family stories of impact
- All relevant marketing materials
- Stat card
- FAQs (including potential objections, costs, etc.)

DEVELOP OFFICIAL CALMER CHOICE BOARD MEMBER AMBASSADOR PROGRAM, IDENTIFYING A CORE GROUP OF BOARD MEMBERS WHO SUPPORT THE ED’S 3 x 3 EFFORTS TO DEEPEN AND BROADEN EXTERNAL RELATIONSHIPS WITH DONORS, PARTNERS AND COMMUNITY MEMBERS
GOAL 1

STRATEGY 3

Improve engagement between board and staff/instructors

Action Steps

YEAR 1
July 2019 – June 2020

IDENTIFY STAFF MEMBERS TO BE PRESENT AT BOARD MEETINGS THROUGHOUT THE YEAR AND CREATE A SCHEDULE FOR THIS

ESTABLISH VISIT SCHEDULE FOR BOARD MEMBERS TO SEE CALMER CHOICE IN THE CLASSROOM

YEAR 2
July 2020 – June 2021

CONTINUE TO CONDUCT CLASSROOM VISITS

CONTINUE INSTRUCTOR PARTICIPATION IN BOARD MEETINGS AND RETREATS

YEAR 3
July 2021 – June 2022

PLAN EVENT TO CELEBRATE AND RECOGNIZE CONTRIBUTION FROM EVERY LEVEL OF THE ORGANIZATION: PROGRAM STAFF, INTERNAL STAFF, BOARD OF DIRECTORS

ANNUALIZE THE EVENT TO CELEBRATE PEOPLE CONTRIBUTIONS
GOAL 1

STRATEGY 4
Review charter, purpose, membership and committees and evaluate effectiveness in relation to the needs of Calmer Choice

| YEAR 1 | July 2019 – June 2020 |
|-----------------------------|
| EXPLORE COMMITTEE STRUCTURE AND ENGAGE EACH BOARD MEMBER TO PARTICIPATE IN COMMITTEE WORK AS INDICATED BY INTEREST |
| HOST FIRST COMMITTEE MEETINGS |

| YEAR 2 | July 2020 – June 2021 |
|-----------------------------|
| COMMITTEES MEET AT REGULAR INTERVALS (TBD) |
| COMMITTEE CHAIRS REPORT OUT AT BOARD MEETINGS REVIEW ANNUALLY |

| YEAR 3 | July 2021 – June 2022 |
|-----------------------------|
| RE-EVALUATE STRUCTURE AND COMMITTEES OF BOARD, USE TO RECRUIT NEW BOARD MEMBERS AND ENSURE THE CURRENT WORKING COMMITTEES MEET THE NEEDS FOR THE GROWTH OF THE ORGANIZATION |
| REVISE BOARD MANUAL TO REFLECT NEW COMMITTEE STRUCTURE |
GOAL 1

STRATEGY 5
Identify key areas for board engagement to support growth

YEAR 1
July 2019 – June 2020

Based on board member feedback in individual meetings, generate a list of opportunities for board engagement beyond committee-specific work, which may include:
- 3x3 strategy to engage board in fundraising and outreach
- 10 year anniversary party
- Focus group on expansion
- Endowment

YEAR 2
July 2020 – June 2021

Each board member engage in one activity outside of committee work

YEAR 3
July 2021 – June 2022

Board members introduce the speakers for our speaker series as part of the Calmer Choice Institute and conduct information exchange at the end of speeches

Create “Job Descriptions” for agreed upon committees along with expectations and structure and reporting schedule for board meetings

Implement board stories as part of website and newsletter, featuring a new board member each month
GOAL 2: Create and Execute a Plan for Financial Sustainability

STRATEGY 1
Develop three-year budget and fundraising plan

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<td>IDENTIFY AND PRIORITIZE LONG-TERM FINANCIAL GOALS, SUCH AS:</td>
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<td>• Cash reserves</td>
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<td>• Endowment</td>
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<td>• Planned giving</td>
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<td>• Capital campaign</td>
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<td>• Expanded major gift program</td>
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<td>• National foundation support</td>
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<td>• School and community</td>
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<td>IDENTIFY STRATEGIES TO MAXIMIZE AND SUPPORT REVENUE COLLECTION EFFORTS FROM SCHOOL AND COMMUNITY</td>
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<td>YEAR 2</td>
<td>July 2020 – June 2021</td>
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<tr>
<td>UTILIZE LONG-TERM GOALS TO INFORM MULTI-YEAR BUDGET</td>
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<td>EXPLORE THE CREATION OF A RISK MANAGEMENT PLAN</td>
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<tr>
<td>IMPLEMENT STRATEGIES TO IMPROVE REVENUE COLLECTION EFFORTS</td>
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<td>YEAR 3</td>
<td>July 2021 – June 2022</td>
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<tr>
<td>BEGIN TO DEVELOP CAPITAL CAMPAIGN FEASIBILITY STUDY</td>
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<td>BEGIN TO IMPLEMENT PRIORITIZED LONG-TERM FINANCIAL GOALS</td>
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