08

**Fall**

**<NAME OF ORGANISATION> Fundraising Strategic Plan**

Stephen Mally, CFRE

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Version Control

|  |  |  |
| --- | --- | --- |
| Date | Change | Version |
| <Date> | Document creation | 1.0 |
|  | Document enhancements | 2.0 |
|  | Document enhancements | 3.0 |
|  | Document enhancements | 4.0 |

# FUNDRAISING OPERATING PLAN

## FY12 – FY14

### Introduction

The resulting document is a Fundraising Strategic Plan by fundraising area: <NAME OF FUNDRAISING AREAS AND HYPERLINK TO EACH>

Each fundraising area has assigned action steps to responsible parties. These parties have been informed of their involvement in each of the plans. The combined plans, with the involvement of these responsible parties, create a comprehensive plan for the department and a powerful team to accomplish each of the goals and the overall combined goal. <NAME OF ORGANISATION> staff are proud of the plan developed. This plan is dynamic in nature and it will be monitored quarterly and annually. When necessary, it will be added to and adjusted accordingly.

**Responsibility Table <WILL BE COMLETED AFTER WORKSHOPS>**

|  |  |
| --- | --- |
| **Position** | **Position (Abbreviation)** |
| Chair of Board | COB |
| Board | BD |
| Chief Executive Officer | CEO |
| Fundraising Staff | FR |
| Donor Relations | DR |
| Marketing Coordinator | MC |
| Fundraising Committee | FRC |
| Supplier | SP |
| Volunteer | VOL |

# EXECUTIVE SUMMARY

## Introduction

Commencing in September, 2014, <NAME OF ORGANISATION> staff undertook an exercise to develop a Fundraising Strategic Plan (FSP) in order to increase capacity to raise funds for <NAME OF ORGANISATION> Institute. The process was driven by leadership, developed by a FundraisingForce Consultant, approved by <NAME OF ORGANISATION> leadership, and implemented jointly by the FundraisingForce Consultant and <NAME OF ORGANISATION>. The process involved the study of <NAME OF ORGANISATION>’s fundraising history and the development of goals, objectives and action steps based on this historical perspective, competitive intelligence and growth projections.

The resulting document is a Fundraising Strategic Plan by fundraising area: <NAME OF FUNDRAISING AREAS AND HYPERLINK TO EACH>

## Business Driver

The business driver for the Fundraising Strategic Plan FY15/16-FY18/19 is to grow sustainable cost-effective and regular revenue streams enabling <NAME OF ORGANISATION> to establish and grow <to be completed>.

The Plan requires <NAME OF ORGANISATION> staff and management working with the Board to enhance fundraising capacity.

## Strategic Approach

The overarching strategic approach underpinning the FSP is to implement fundraising programs and initiatives focused on:

* Acquiring new donors
* Engaging donors
* Maintaining/retaining donors
* Upgrading donors to higher levels of giving

## Ownership

The methodology employed to develop the FSP was highly collaborative and consultative to ensure that all involved have a strong sense of ownership of the plan. Strong fundraising programs are best developed through the collaborative creation of goals setting from the programmatic level upward. The process involved staff of all levels and staff from a variety of <NAME OF ORGANISATION> departments. This is important if <NAME OF ORGANISATION> is to be successful in realising the fundraising goals.

## Structure of Fundraising Program

The structure of the fundraising program is aligned with the pyramid of giving:

* Direct Marketing program  – <NAME OF ORGANISATION> community involvement; direct mail; staff and volunteer engagement; special events; third party events; regular giving
* Major Giving program – major gifts; corporate and community partnerships; trusts and foundations
* Bequests

The pyramid of giving is designed to demonstrate the donor lifecycle. Donors will first become engaged with <NAME OF ORGANISATION> at the base or foundation of the pyramid through direct marketing programs. At this stage, donors are identified. <NAME OF ORGANISATION> Institute staff engagement, payroll giving, direct marketing, special events, community fundraising, and regular giving are vital programs to the success of <NAME OF ORGANISATION>. At the second stage of the pyramid, donor’s become more informed, their interest grows, and they become more involved in the organisation, its mission and their commitment to the mission. This position of the pyramid includes major gifts, corporate and community partnerships, and trusts and foundations. At the top of the pyramid, an individual donor’s ultimate commitment to <NAME OF ORGANISATION> will emerge as donor’s leave a legacy to the organisation through a bequest. This is the ultimate investment any donor will make. The philosophy is that all major giving prospects may also bequests prospects.

## Fundraising Revenue History

Before <NAME OF ORGANISATION> can plan and is able to project revenue goals for the future, it is critical that historical fundraising achievements be documented as part of this Fundraising Strategic Plan.

<CHARTS AND GRAPHS>

## Cost of Fundraising

One important metric for the Board and staff to examine is the cost of fundraising. Certain avenues for fundraising are more expensive than others and, thus, have lower return on investment (ROI).

<CHARTS AND GRAPHS>

## Number of Donors

Fundraising is measured by many metrics, including revenue, number of donors, average gift, cost of fundraising, and others.

<NARRATIVE>

<CHARTS AND GRAPHS>

## Projected Revenue

<NARRATIVE>

## Expenses

Fiscal year expenditure forecasts were developed and this will ultimately become part of <NAME OF ORGANISATION>’s annual budget planning cycle.

Based on the proposed programs and activities outlined in the FOP, it is anticipated that the most significant increases in expenditure will be in the following areas:

* <AREA>
* <AREA>
* <AREA>

## Goals

<NARRATIVE>

<LINKS TO EACH FUNDRAISING AREA>

## Reporting and Analysis

Throughout the three year time period, it will be critical to establish proper metrics to measure the success of the FSP. Staff and suppliers will be required to report on key performance indicators such as total dollars raised, numbers of acquired/new donors, cost to raise a dollar, donor retention rates, donors upgraded, and other important measures. These metrics may not be available nor in place as of the development of the FSP. The staff will ensure they are available from this point moving forward.

The ongoing focus on results delivery and results analysis creates a new climate in fundraising at <NAME OF ORGANISATION>.

## Dynamic Document

The FSP is a dynamic document and a roadmap for <NAME OF ORGANISATION> for the next three years. Like anyone utilising a roadmap, <NAME OF ORGANISATION> may decide to adjust its route based on road conditions, climate, or other factors. As staff monitor, analyse, and report, staff will keep the Board fully informed of any changes to the FSP over time.

## Timeline

<Graphic to represent implementation timeline>

# <NAME OF ORGANISATION> STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT)

<NAME OF ORGANISATION> went through an exercise to identify Strengths, Weaknesses, Opportunities, and Threats (SWOT) as they relate to fundraising. This SWOT analysis, allowed <NAME OF ORGANISATION> to determine ways in which the organisation stands out, ways in which <NAME OF ORGANISATION> have challenges in gaining support, opportunities for improvement, and difficulties faced in raising support.

The chart, which, follows, will highlight the SWOT analysis outcomes.

|  |  |  |  |
| --- | --- | --- | --- |
| **Strengths** | **Weaknesses** | **Opportunities** | **Threats** |
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Key issues from SWOT

* <ISSUE>
* <ISSUE>
* <ISSUE>
* <ISSUE>
* <ISSUE>
* <ISSUE>

## STRATEGIES TO OVERCOME KEY ISSUES IDENTIFIED FROM SWOT

|  |  |  |
| --- | --- | --- |
| **SWOT ISSUE** | **STRATEGY** | **RESOURCE REQUIRED** |
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# COMPETITIVE LANDSCAPE

Some key findings include:

* <KEY FINDING>
* <KEY FINDING>
* <KEY FINDING>
* <KEY FINDING>
* <KEY FINDING>

# COMPARITIVE ANALYSIS

<NARRATIVE>

# DIRECT MARKETING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# PAYROLL GIVING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
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  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
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  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
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## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# <NAME OF ORGANISATION> WORKPLACE GIVING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
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## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
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  + Step Two (Assigned to)
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* **FY17/18**
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## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
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* **FY17/18**
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## Goal Three

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
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* **FY16/17**
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## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
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  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# COMMUNITY FUNDRAISING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
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* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
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## Goal Two

## Objective One

## Action Steps

* **FY15/16**
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## Goal Three

## Objective One

## Action Steps

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# EVENTS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

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# REGULAR GIVING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

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* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# DONOR CLUBS/SOCIEITES

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# MAJOR GIFTS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
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  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
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## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
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  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# BEQUESTS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
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## Objective Two

## Action Steps

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  + Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
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## Objective Two

## Action Steps

* **FY15/16**
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  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# CORPORATE PARTNERSHIPS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
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  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
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  + Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

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  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# TRUSTS AND FOUNDATIONS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
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  + Step Three (Assigned to)
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  + Step Three (Assigned to)
* **FY17/18**
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  + Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
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## Goal Three

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  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# DONOR CARE AND STEWARDSHIP

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY17/18**
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  + Step Three (Assigned to)

## Objective Two

## Action Steps

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## Goal Two

## Objective One

## Action Steps

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## Goal Three

## Objective One

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  + Step Three (Assigned to)
* **FY17/18**
  + Step Two (Assigned to)
  + Step Three (Assigned to)

# BOARD AND LEADERSHIP DEVELOPMENT

Narrative

## Goal One

## Objective One

## Action Steps

* **FY15/16**
  + Step One (Assigned to)
  + Step Two (Assigned to)
  + Step Three (Assigned to)
* **FY16/17**
  + Step Two (Assigned to)
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## Objective Two

## Action Steps

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## Goal Two

## Objective One

## Action Steps

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## Goal Three

## Objective One

## Action Steps

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