[CASA program name] Resource Development and Financial Sustainability Plan

Addendum to 2019-2021 Strategic Plan

[CASA program name] is devoted to resource development and sustainability. This worksheet shall be used to guide its activities and goals related to resource development and sustainability. Data shall be collected and shared through the Dashboard when applicable. Goals will be measured accordingly.

Goal #1: Increase Individual Giving

Questions to consider:

* What are the demographics of those that give to [CASA program name]?
* What percentage of the funds received are from individual donations?
* How do we increase individual donations?
* How do we increase recurring donations?

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| **Objectives/Action Steps**Specific, measurable activities to achieve goals. | **Who** Person Responsible | **When** Timeline | **How** The way the goal will be measured, data collected/observed |
| Step 1: Collect Data on individual donations | Executive Director | Completed at the conclusion of each year | By completion |
| Step 2: Create table on demographics of individual donors  | Executive Director; Marketing and Communications Director | Completed Feb of each year  | Create a presentation outlining the comparison. Who’s overrepresented/underrepresented? |
| Step 3: Increase board donations | Board of Directors | Completed end of each year | Track donations of each board member end of year |
| Step 4: Increase Donor Outreach by 25% | Executive Director and Board Members | Continuous with data collection at the end of each year | Data will be collected at the end of the year to determine whether goal was met |
| Step 5: Increase recurring donation by 10% | Executive Director and Board of Directors | Continuous with data collection at the end of each year | Data collected to determine whether goal was met  |
| Step 6: Set up automatic electronic recurring donation process | Executive Director; Marketing and Communication Director | By completion | By completion |
| Step 7: Year end campaign increase of 25% | Executive Director; Marketing and Communications Director | End of year | Data will be collected at the end of the year to determine whether goal was met |

Goal #2: Implement and Increase State Funding

Questions to consider:

* What is the current funding from the state and county?
* Who are our connections to the state and local legislature?

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| **Objectives/Action Steps**Specific, measurable activities to achieve goals. | **Who** Person Responsible | **When** Timeline | **How** The way the goal will be measured, data collected/observed |
| Step 1: Secure state legislative support for inclusion in state biannual GRF budget | Executive Director; Marketing and Communications Director; Board of Directors | Continuous | Increase contacts from state legislatureMarketing materials targeted towards legislatureSchedule meeting with new state legislaturesTrack legislative support Measured by completion of items listed above and amount of continued funding granted to [CASA program name] by state |

Goal #3: Increase Grant Funding

Questions to consider:

* What percentage of all revenue is from grant funding?
* What are the sources of grant funding?
* What untapped funding sources give to organizations with similar missions?

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| **Objectives/Action Steps**Specific, measurable activities to achieve goals. | **Who** Person Responsible | **When** Timeline | **How** The way the goal will be measured, data collected/observed |
| Step 1: Increase Supreme Court of Ohio -Court Improvement Grant by 10% | Executive Director  | By completion | Renew Contract with goal of increasing funds by 10%; goal measured by completion  |
| Step 2: Increase Job and Family Services – CAPTA funding by 10% | Executive Director; Training Director | By completion | Renew contract with goal of increasing funds by 10%; goal measured by completion |
| Step 3: Maintain VOCA funding as close to recent years  | Executive Director | By completion | Ask for current funding from VOCA with goal of not decreasing funding |
| Step 4: Secure 3 new funding sources | Executive Director; Board of Directors  | By completion | Research funding sources Outreach to untapped funding sources; continue outreach throughout yearMeasured by completion  |

Goal #4: Increase Foundation Commitments

Questions to consider:

* What percentage of all revenue is from foundational giving?
* What are the sources of current foundational giving?
* What untapped foundations give to organizations with similar missions?

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| **Objectives/Action Steps**Specific, measurable activities to achieve goals. | **Who** Person Responsible | **When** Timeline | **How** The way the goal will be measured, data collected/observed |
| Step 1: Increase existing foundation contributions by 25% | Executive Director; Board of Directors  | By completion | Research foundations that give to organizations with similar missionsMeasure by data collection at the end of each year to determine if goal was met  |
| Step 2: Connect with a minimum of three new foundations | Executive Director; Board of Directors | By completion | Schedule meetings with 3 new foundations based off of research done in Step 1Measured by completion |
| Step 3: Secure funding from one new foundation grant | Executive Director; Board of Directors | By completion | Measured by completion at the end of the year |

Goal #5: Work toward a more balanced and sustainable funding scheme

Questions to consider:

* What percentage of revenue goes towards program expenses?
* What percentage of revenue do the auditors recommend go to program expenses?
* What percentage of revenue is unrestricted? What should be the goal?
* What are the organization’s savings in terms of monthly expenses?

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| **Objectives/Action Steps**Specific, measurable activities to achieve goals. | **Who** Person Responsible | **When** Timeline | **How** The way the goal will be measured, data collected/observed |
| Step 1: Collect information regarding [CASA program name]’s program expenses | Executive Director; Fiscal Administrator; Board of Directors  | End of each year | Review finances to determine program expenses  |
| Step 2: Collect information regarding recommended revenue for program expenses | Executive Director; Fiscal Administrator; Board of Directors | By completion | Work with auditors to determine the amount of revenue that should be used for program expenses |
| Step 3: Collect information regarding [CASA program name]’s unrestricted revenue | Executive Director; Fiscal Administrator; Board of Directors  | End of each year | Review finances to determine unrestricted funds |
| Step 4: Determine goal for unrestricted funds | Executive Director; Fiscal Administrator; Board of Directors | By completion | Research and determine goal for unrestricted funds (25%)Measured by completion |
| Step 5: Collect information regarding [CASA program name] savings | Executive Director; Fiscal Administrator; Board of Directors | End of each year | Review finances to determine savings  |
| Step 6: Determine goal for savings | Executive Director; Fiscal Administrator; Board of Directors | By completion | Research and determine goal for savings (9 months worth)Measured by completion |

**Scheduling review of this document**

This one page document is to be included in the Resource Development and Sustainability Plan. The Resource Development and Sustainability Plan should be reviewed by the Executive Director and Board annually or as changes need to be made. Below is the scheduling of the next review.

**Last Revised:** November 2021

**Next Review Scheduled:** November 2022

**First Adopted:** November 2021