**SVP ANNUAL PLAN TEMPLATE**

Date of Cycle July 20XX

Investee Contact: \_\_\_\_\_\_\_\_\_\_\_\_\_

Lead Partner(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**INVESTEE Organizational Capacity-Building Goals and Milestones** (The Capacity Areas are the same as in the Organizational Capacity Assessment Tool. The Investee may include one or all Capacity Areas. There may be more than one Goal listed for each Capacity Area.)

|  |  |  |  |
| --- | --- | --- | --- |
| **Capacity Area**  | **Goals** | **Action Items** | **SVP Volunteers** |
| **Fundraising Strategy** | * Diversify financial support
* Develop an integrated funding plan
 | * Increase amount of earned income
* Strengthen tuition collection procedures to collect 95% tuition
* Attain new federal funding streams
* Increase corporate dollars by $50k (year 1)
* Increase foundation dollars by $25k (year 1)
* Increase individual gifts by $50k (year 1)
	+ Grant Coordinator and Writer to be hired (Name of person[s] responsible)
	+ Plan team facilitation session in October to further discussions around roles and responsibilities
* Secure cash reserve for organizational stability (Name of person[s] responsible)
 | * List names of SVP Partners who volunteered on these projects
 |
| **Human Resources** | * Leadership development & succession planning
* Strengthen internal procedures and communication
* Increase opportunities for engaged learning and training for staff
* Enhance staff hiring, management, and retention systems
 | * Develop a leadership succession plan (Name of person[s] responsible)
* Currently on back-burner while writing grant to raise money for COO position
* Review current employee handbook (legal and non); update as appropriate (Name of person[s] responsible)
* Employee handbook completed
* Further develop internal procedural systems and policies (Name of person[s] responsible)
* May need help identifying areas that still need procedures
* Increase professional development training offerings (Name of person[s] responsible)
* Increase opportunities for individual and site staff coaching providing observation, modeling, and constructive feedback (Name of person[s] responsible)
* Develop efficient system for training new staff members, including written support materials (Name of person[s] responsible)
* Increase staff retention rates to 90% (Name of person[s] responsible)
* Refine staff hiring plan, including how to find quality staff members at a part-time rate (Name of person[s] responsible)
* Completed compensation review of ODA salaried staff, presented at June board meeting
* Develop pay scales (Name of person[s] responsible)
* Finalizing pay scales and recommendations to change pay with board sub committee on Aug 20
 | * List names of SVP Partners who volunteered on these projects
 |
| **Community Engagement** | * Increase volunteer engagement
 | * Build structure around volunteer engagement to: (Name of person[s] responsible)
* Sustain 100% parent involvement
* Develop consistent and sustainable volunteer base in partnership with colleges, universities, corporations, and organizations
* Engage high school alumni in giving back to the organization through volunteer engagement
* Develop training manual for volunteers (Name of person[s] responsible)
 | * List names of SVP Partners who volunteered on these projects
 |
| **Board Development** | * Increase board member engagement
* Support board with additional expertise
 | * Identify best practices to:(Name of person[s] responsible)
* Increase board involvement in fundraising
* Increase opportunities for board training
* Develop a shared vision for future organizational growth
* Develop concrete process & procedures
* Establish Advisory Board (Name of person[s] responsible)
* Establish a Young Adult Fundraising Board (Name of person[s] responsible)
 | * List names of SVP Partners who volunteered on these projects
 |
| **Scaling** | * Scale model to serve 80 schools in Ohio in next 10 years
* Investigate potential opportunity to scale model beyond Ohio as a means to generate revenue to support organizational growth
 | * Develop a plan to(Name of person[s] responsible):
* Scale model to 80 schools in OH in next 10 years
* Understand impact on fundraising goals
* Understand impact on infrastructure
* Scaling subcommittee already working on understanding impact and determining realistic path to scale and serve more schools
* Attend SVP annual convention in October - preconference topic is on scaling (ED and LP to attend conference and schedule follow up meeting with board subcommittee to share findings)
* Assess viability of scaling model and training and endorsing sites outside of OH (Name of person[s] responsible)
 | * List names of SVP Partners who volunteered on these projects
 |
|  |