

#1 – Deliver transformative programs.

Strategy	Action Steps	Who	Start	Complete	Q1
1a. Map mission, vision, values in relation to community needs to inform programs and services.	Gather community data to understand needs (theory of change).	Matt	Q1	Q2	Commissioned and guided Wilder Research on the needs of immigrant populations served by Accola.
	Analyze findings from Wilder Research for LIS and Sarah's.	Cheryl, Elisabeth	Q1	Q2	Wilder findings affirm Accola operational plan goals and advise about how to accomplish these goals. They recommend strengthening existing programming rather than starting new. A one-page report on this outcome is available.
	Implement appropriate findings from Wilder Research for LIS and Sarah's.	Cheryl, Elisabeth	Q2	Q3	Due Q3
	Form diverse committee to determine WW's future focus.	Matt	Q1	Q1	Launched the Programs and Opportunities Committee with Anne Weyandt as Chair. Committee's first project is to guide research on Wisdom Ways.
	Achieve consensus around mission, definitions, and recommendations for structure WW.	Cindy	Q1	Q2	P&O Committee is leading this work. Stakeholders and interview questions have been identified.
	Hire WW leader.	Matt	Q2	Q3	Due Q3
1b. Develop programs and services plan.	Develop and implement decision making tool (mission-sustainability matrix) of current programs and potential additions to those programs.	Matt	Q1	Q2	Launched foundational work for the sustainability project with SLP, board representatives and Tangelo Tree Consulting.
	Establish program goals/cost per participant (business plan).	Matt	Q2	Q3	Due Q3
	Explore if St. Mary's Clinics relationship can align with mission-sustainability matrix.	Matt, Board Chair	ongoing	ongoing	Met quarterly with SMHC to deepen relationship and exchange information.
	Share outcomes on a quarterly basis.	Prog Directors	ongoing	ongoing	Program outcomes are being defined within the organizational sustainability project.
	Refine outcomes in relation to theory of change work.	Matt	Q1	Q2	Due Q2
	Develop outcomes reporting mechanism.	Matt	Q2	Q3	Due Q3
1c. Deepen existing and identify new partnerships that advance mission, vision, and program goals.	Define partnership expectations and commitment.	Prog Directors	Q3	Q4	Due Q3
	Develop screening tool to evaluate partnership possibilities.	Prog Directors	Q3	Q4	Due Q4
	Define potential mission-aligned partners for each program.	Prog Directors	Q3	Q4	Due Q4

#2 – Build organizational capacity.

Strategy	Action Steps	Who	Start	Complete	Q1
2a. Build a cohesive, inclusive, and team-oriented work environment and culture.	Determine organizational structure.	Matt	Q2	Q3	Established Accola's requirement for an independent CFO and accounting office. Hired finance consultant migrate from Provenance system to Quickbooks.
	Define topics for staff discussion (values in practice, program understanding, e.g.) and develop calendar for those discussions.	Matt	Q1	Q1	Deferred to Q2
	Identify consultant to develop approach to DEI work for board.	Governance Cmtee	Q3	Q4	Due Q4
	Build equity, inclusion, and culture initiatives and training into budget.	Matt	Q4	Q4	Wilder Study provided guidance as to where Accola can begin to build relationships within the communities it serves.
2b. Develop and deploy internal and external communications.	Develop brand.	Matt	Q1	Q1	Brand and style guide developed with Marketing Committee. Identified alternate and more cost effective firm to support brand implementation.
	Create communications plan (key messages, print and digital tools, social media strategy, public relations).	Matt	Q1	Q1	Plan developed and presented to the Board in September Executive Committee and Education Session.
	Develop strategies and policies for internal communications.	Ralph	Q1	Q1	Transition/launch plan created by Parenteau Graves. Ongoing communications plan developed and shared with SLT. Will go to Parenteau Graves for input and further guidance.
2c. Build robust fundraising effort.	Approve goals and strategies for major donors, foundations, corporate donors.	Ralph	Q1	Q2	Plan developed and shared with SLT and Advancement Committee. Will go to Parenteau Graves for input and further guidance.
	Implement annual and long-term giving plan.	Ralph	ongoing	ongoing	Working with Parenteau Graves on annual appeal that will launch Accola to donors. Worked with several board members to make 200 introductory calls about Accola in advance of public launch.
2d. Develop key systems, policies, and procedures.	Define consultant to create employee manual.	Matt, Kim	Q4	Q4	Due Q4
	Establish finance policies and procedures.	Matt, CLA	Q1	Q1	Comprehensive list of missing policies and procedures is in development. Recommended policies will be presented for review and approval to the Finance and Investment committees in Q2.

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	Define finance roles and responsibilities.	Matt, CLA	Q1	Q1	Established Accola's requirement for an independent CFO and accounting office. Hired finance consultant migrate from Provenance system to Quickbooks.
	Determine technology needs (software, hardware, network, IT, etc.).	Matt, Lacy	Q1	Q2	With SLT and several tech firms, determined Accola will migrate the individual network of each department to a shared Office 365 account. Engaged IT firm to implement and manage.
2e. Build a volunteer program.	Identify volunteer opportunities.	Ralph	Q1	Q1	Working with program directors to identify opportunities. New Volunteer Coordinator will continue these conversations.
	Define qualifications, roles, and responsibilities for a volunteer manager.	Ralph	Q1	Q1	Crafted Volunteer Coordinator job description approved by Kim Wagner.
	Hire volunteer manager.	Ralph	Q1	Q2	In hiring process. Should hire by mid-October.
	Develop volunteer manual.	Ralph	Q2	Q3	Volunteer Manager job description is developed and hiring is underway.
	Develop holistic plan to recruit, onboard, and manage, and appreciate volunteers.	Ralph	Q2	Q3	Due Q3