PA USA: The Second Phase
Strategic Plan 2021-2024

Introductory Statement

PA USA is a social service, relief and development nonprofit organization that was launched in 2016. The organization’s first Strategic plan covered the period from 2016 to 2019. The emergence of a global pandemic in 2020 meant that the formation of a new strategic plan was delayed and not conducted that year. In early 2021 the PA USA Board launched a strategic planning effort. The Board established a Strategic Planning Committee consisting of three Board members and the CEO; this committee led activities throughout 2021 to review the existing strategic plan and make modifications as necessary based on successes and challenges of the past 5 years and the current external and internal environment.

Committee members conducted a quantitative and qualitative review of data and reference materials and interviewed stakeholders including board members, staff members, and PA USA supporters (see Appendices for details). The information gathering activities were focused on an assessment of the current state (including an updated SWOT analysis) as well as a review of the 3 key priority areas identified by the board:

- **Key Priority 1: Increase impact** - Establish PA USA as a credible social service, relief and development nonprofit organization that follows industry best-practices and helps people a) survive emergencies in a dignified manner and b) escape poverty in a sustainable way.
- **Key Priority 2: Build capacity** - Build long-term institutional capacity to ensure quality of programming, and increasingly be an employer of choice.
- **Key Priority 3: Ensure Sustainability** - Build PA USA’s financial sustainability to ensure longevity, by diversifying revenue, increasing revenue from major donors, and reducing dependence on low dollar individual contributions.

The PA USA mission and vision statements were last revised in 2019 as part of global PA process. There is currently a global process underway to evaluate these statements. (TBD – awaiting details)

Staff have reviewed this plan and have had an opportunity to feed into it. The final plan, *PA USA: The Second Phase*, will need to be approved by the PA USA Board at the Q2 2021 board meeting.
PA USA: The Second Phase builds upon the prior strategic plan with a focus on impact at scale. It includes renewed support for implementing top quality programs, measuring the impact of our work, building our capacity in all departments, and making efforts to increase sustainable funding to support PA USA’s growth and impact into the future.

PA USA Background/History

Since 2016, PA USA has raised over $22 million for a range of humanitarian programs and interventions. More importantly, it has helped over one million people in their hour of need.

PA USA was founded in Alexandria, VA, in 2016. The decision to launch a US affiliate was part of a desire by PA UK to create a global organization and brand. This coincided with our founders’ own desire to launch a new best-practice humanitarian organization within the American Muslim Community. PA USA was the first PA affiliate to launch, followed by PA Australia, PA South Africa and PA Canada. Penny Appeal UK has a branch office in the UAE (Dubai).

Penny Appeal USA Identity

Confidently Muslim, Proudly American. While PA USA is a Muslim-led organization, we are an inclusive organization that aims to reflect the rich diversity of America. We help all people in their hour of need, regardless of their faith. We aim to be inclusive in all aspects, from the people we recruit, the messaging we put out, and the people we help.

Penny Appeal USA Approach

We want to connect with a new generation of philanthropists and inspire them to give generously to those in need. Our approach to charity is simple, yet it has a massive impact. We make charitable giving affordable and rewardable, ensuring everyone can help those in need by donating just a few pennies each day. (Your pennies are not Jeff Bezos’s pennies!) We raise money through sports challenges, hilarious comedy events, uplifting music tours, digital marketing, and other innovative and fun activities.
Programs Description

Today, PA USA supports numerous programs that fall under seven thematic areas:

- **Feed Our World**: Providing food to food-insecure families (United Nations Sustainable Development Goal “UN SDG” #2)
- **Thirst Relief**: Providing communities with access to clean water (UN SDG #6)
- **Emergency Response**: Providing essential services and goods to victims of natural disasters and conflict (UN SDG #1)
- **Heal Humanity**: Providing healthcare services and goods to communities in need (UN SDG #3)
- **Education First**: Providing children under the age of 18 with access to primary and secondary education (UN SDG #4)
- **Income Generation**: Helping low income families earn a sustainable income (UN SDG #1 and #8)
- **OrphanKind**: Providing financial support to orphaned children ensuring they lead fulfilling lives (UN SDG #1, #2, #3, #4)

The Sustainable Development Goals (SDGs) are the world’s shared plan to end extreme poverty, reduce inequality, and protect the planet by 2030. Adopted by 193 countries in 2015, the SDGs emerged from the most inclusive and comprehensive negotiations in UN history and have inspired people from across sectors, geographies, and cultures. PA USA is focusing on the 7 above SDGs as these are the historical programs inherited from PA UK.

As a Muslim-led organization funded largely by donations from American Muslims, PA USA offers donors the chance to fulfill their religious obligations and support a number of seasonal programs under a Religious Giving category. These include:

- Zakat Al Maal
- Zakat Al Fitr
- Fidya/Kiffarah
- Sadaqah Jariyah
- Aqiqah
- Qurbani
- Khums (while we have not to date focused on this, we should seek to become Khums accredited)

PA USA has built collaborative partnerships with a diverse network of community-based organizations and leaders, faith groups, social service organizations and international humanitarian organizations.

PA USA is governed by a Board of Directors. As of writing there are six board members. Day to day management of the organization is delegated to the CEO, who in turn leads a leadership team comprised of development, program, and operations professionals. As of June 2021, PA USA staff consists of 14 full time staff and numerous contractors and vendors. PA USA engages interns on a regular basis. Staff are based mostly in head office which is located in Alexandria, VA, with a few staff hired to work remotely.
PA USA: The Second Phase

Organizational Vision
Our vision is a world that’s united and strong. Communities working together, supporting one another, leaving need and poverty behind for good. (May need revising to match other PA affiliates and include DV work)

Mission Statement
TBD – at the time of writing a missing statement did not exist.

Values
In 2020 a global PA values exercise was led by Dr. Bilal Hassam. 8 x 2-hour workshops were held with over 130 employees representing all the PA affiliate members. These are the values agreed upon:

- **ALWAYS DO THE RIGHT THING** - Our foundation is built upon trust and integrity, we hold ourselves to the highest ethical standards, being accountable for all that we say and do.
- **STRIVE TO GO ABOVE AND BEYOND** - Our aspiration is to excel in every area of our work, endeavoring to be our very best, always improving and seeking to exceed expectations.
- **BUILD EMPOWERED COMMUNITIES** - Our culture puts people at the heart of everything we do, investing in and entrusting others with the resources they need to lead.
- **NUTURE CREATIVITY** - Our technique champions innovation, confidently daring to do things differently, pushing boundaries and thinking outside of the box.
- **MAKE LASTING CHANGE** - Our strategy is to establish sustainable humanitarian interventions, leaving life-changing legacies that break the cycle of poverty for good.
- **EMBRACE DIVERSITY** - Our philosophy is to celebrate difference, leveraging our distinctiveness to strengthen our organization and create truly safe and inclusive spaces.

The prior strategic plan rightly focused on creating a robust infrastructure for PA USA as a new entity and heavily emphasized fund-development in efforts to becoming both a financially viable organization and a financially sustainable one. In the next three years PA USA will focus on impact. Through continuing our financial growth and further investing in our capacity, we aim to deliver impactful, high quality, life-changing programs.
Target Audience/Base
In the next three years PA USA will continue to focus fund-development efforts on:
- “Culturally” American Muslim Millennials (aka Gen Y) born 1977-1995
- “Culturally” American Muslim Gen Z born after 1996

According to a 2017 Pew Research Center Study, only 43% of American Muslims attend a mosque regularly. This numbers appears to be too high and American Muslim leaders calculate the real number to be far less than this. Per the study, those who don’t attend the Mosque regularly are still proud Muslims and still want to give to charity. This is the community we are targeting. “Conservative” and or “religious” American Muslims already have many vehicles for their charitable giving. These “cultural” Muslims often are excluded from campaigns and or events.

In the next three years PA USA will continue to serve:
- Victims of natural disasters
- Victims of violence
- Socio-economically disadvantaged communities who lack access to basic necessities such as food, water, education, healthcare and shelter.

In the next three years PA USA will continue to work with:
- Volunteers
- Ambassadors
- Places of worship & Faith Leaders
- Community leaders
- Local, national and international service providers
- Policy makers
- Allies & coalitions focused on poverty eradication

What PA USA Is Not

- Penny Appeal USA is not a religious organization
- Penny Appeal USA is not a civil rights organization
- Penny Appeal USA is not a human rights organization

Governance
Through 2024, PA USA’s Board of Directors will continue to include 7-9 individuals representing diverse professions, geographies across the U.S., race/ethnicities, and gender, with clear succession and engagement plans.
Resource Development and Staffing
By 2024, PA USA’s annual budget will have grown to $18 million, with a stretch goal of $20 million, with 12 months of operating costs on hand, reflecting the resources needed for successful implementation of the organization’s goals. This will be achieved by the implementation of an ambitious best-practice development plan along with the necessary resources to support the plan. The balance in organizational expenditures will continue to tip favorably towards programs, with at least 75% of PA USA’s budget spent on programs. PA USA’s staff capacity is expected to grow from 14 to approximately 20 full-time staff, to achieve its goals.

Fulfilling Our Mission: Key Priorities for 2021-2024

Key Priority 1: Increase impact - Establish PA USA as a credible social services, relief and development organization that implements impactful programs through adhering to industry best-practices.

Successes and Challenges in past 5 years
Since 2016, PA USA has been able to successfully support a wide range of programs both domestically and internationally. This includes responding to disasters, supporting orphans, constructing clean water solutions, opening a domestic violence shelter, building and refurbishing computer labs, supporting refugee families, providing cash assistance to those impacted economically by the COVID-19 pandemic, and regularly feeding those suffering from food insecurity. Many American Muslims have come to respect the work of PA USA and we have become their humanitarian partner of choice. They have also come to rely on our seasonal programs as well as our humanitarian responses. The previously defined strategic goal of spending 70% of budget on program activities was achieved four out of the five years. However, there is a significant need to improve the quality of our programs and measure the impact of our work. We must ensure that our programs adhere to international humanitarian standards and protect the dignity of those we serve.
1. Measure the impact of our work through program quality and MEAL

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<td>Develop clear logic models and success indicators for all programs and work with IT department to improve data collection systems and data tracking.</td>
<td>1. Measuring for management, also known as “monitoring,” will focus on processes, efficiency, and execution (i.e. the number of participants in a FOW distribution). This data to be collected and analyzed on a monthly basis. 2. Measuring for strategy, also known as evaluation, will focus on the long-term effects and information needed to support future planning. This data (i.e. the effects of the IG program on participant livelihood) will pertain to outcome and impact statistics and will conducted on an annual basis.</td>
<td>• Baselines and targets to be developed for each of our key programmatic areas and clear logic models developed.</td>
<td>Senior Programs Manager</td>
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2. Increase Domestic & International Impact

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<td>Consolidate US Based Programs with a focus on providing support to victims of domestic violence, helping those facing food insecurity and responding to domestic emergencies</td>
<td>1. Domestic Violence: Become the foremost Muslim-led nonprofit working on domestic violence in the country. Ensure our 24 hr helpline becomes the most nationally recognized domestic violence helpline amongst American Muslims and launch (and sustainably fund) one more temporary domestic violence shelter in addition to the one we have in Charlotte, NC. 2. Food Insecurity: Move away from partner-led one-off food distributions to directly managing two food pantries. 3. Emergency Response: Form and train a Disaster Response Team (“DRT”) to ensure we are able to deploy to US disasters in an effective and efficient manner.</td>
<td>• We become a resource to American Muslim communities wanting to learn more about domestic violence, the ways to stop it and how to help victims. • Provide shelter to at least 200 women each year by 2024 • From 2022 we receive at least 750 phone calls a year on the helpline. • By 2024 we provide food to at least 500 families on a monthly basis through our two food pantries. • DRT formed by Jan 2023. • From 2023 we respond to at least three domestic disasters a year. • In 2023 become a member of the National Voluntary</td>
<td>Senior Programs Manager</td>
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Increase International Impact through consolidating field partners and improving quality of interventions.

1. Have more influence over our programs by working with fewer partners. Establish strategic partnerships with key partners based along thematic or geographic lines.

2. OrphanKind: Decrease dependence on PA UK programs team and manage our own comprehensive OK sponsorship program through vetted local partners.

3. Feed Our World (“FOW”): Move away from one off food distributions to supporting fewer interventions aimed at sustainably tackling food insecurity.

4. Thirst Relief: Move away from manual hand pumps and wells to more suitable solar pumps and clean water solutions.

5. Education First (“EF”): Design and launch one flagship EF program.

6. Adopt the Core Humanitarian Standard on Quality and Accountability (“CHS”) which sets out nine commitments for humanitarian and development actors like us to measure and improve the quality and effectiveness of our assistance.

7. Ensure we have industry leading Safeguarding processes and the Minimum Standards for Child Protection in Humanitarian Action.

Organizations Active in Disaster (“VOAD”).

- By Jan 2025 support at least 3,000 individual orphaned children.
- By 2024 Over 70% of the FOW budget spent on sustainable food solutions
- By 2024 over 70% of our water interventions are environmentally and financially sustainable
- By Q4 of 2022, launch a flagship EF program.
- PA USA to be certified against the CHS through a formal certification scheme. The certification process is known as the Humanitarian Quality Assurance Initiative (“HQII”).
- PA USA will successfully pass an audit of its safeguarding procedures and will adhere to Minimum Standards for Child Protection in Humanitarian Action.
3. Build an Advocacy & Government Affairs Department

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| The root causes of poverty are inequality, discrimination, poor governance, conflict, exploitation, and violence. We cannot fight poverty without tackling its root causes. | 1. Hire an Advocacy Lead  
2. Play a more active role in existing coalitions we are a member of such as InterAction and Alliance to End Hunger.  
3. Create a clear Advocacy Agenda  
4. Integrate advocacy into our organizational culture. | • Have an Advocacy Lead in place by Sep 2022  
• Agree Advocacy Agenda by March 2023 | CEO |

4. Work with other PA affiliates to finalize a global PA governance structure to increase our joint impact and reduce risks and inefficiencies

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| Together the global PA family can make a greater dent on poverty. Mutual collaboration will lead to increased effectiveness in the field as well as increased efficiencies. | 1. Work with an international PA task force committee to research global governance structure and agree upon a structure for PA.  
2. Implement a Quality Management System (QMS) to measure against international & sector standards (incl. board make-up)  
3. Agree shared values/mission/vision  
4. Agree representation on international bodies & clusters. | • Clear global decision-making process in place for PA  
• Overarching Quality Management System in place  
• Global risk management incl. identification & mitigation of risks  
• A structure that promotes an equal involvement and input from all members characterized by an extremely high level of cooperation, information sharing and coordination  
• More coordinated ER interventions globally | Board Chair, CEO |
5. Strengthen the Impact of #TeamOrange

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| Volunteers are vital to nonprofit organizations. Their active participation in fundraising, marketing, and program delivery can save us hundreds of thousands of dollars a year as well as raise us significant funds. | 1. Create a Volunteer Program Mission Statement  
2. Set Clear Volunteer Program Goals  
3. Engage diverse (age, race, religion, location) volunteers in our shelters and food banks  
4. Engage diverse volunteers to help us with Administrative and fundraising support | • AT least 2000 volunteer hours spent on our social service programs  
• One million dollars raised by #TeamOrange Annually | CDO, National #TO coordinator |

**Key Priority 2: Build capacity - Build long-term institutional capacity to ensure quality of programming and increasingly a best-practice employer of choice.**

**Successes and Challenges in past 5 years**

Since 2016, PA USA has continued to establish strong institutional capacity through its governance, staff, and operations. The PA USA board has successfully transitioned from the initial founding board to a new set of board members. From PA USA’s inception, the board has never been involved in the day to day operations of the organization, and is truly a governing board. While still needing improvement, PA USA currently has a diverse board, in terms of tenure, geographic locations across the U.S., professional expertise, and demographics. Additionally, PA USA’s organization boasts a fully staffed, professional team with strong supporting infrastructure.

However, PA USA’s resources are still limited when it comes to its institutional capacity. Existing staff need additional resources and infrastructure to do their jobs optimally. And, additional staff are still needed in each department. The organization has always prioritized staff benefits and professional development opportunities. However, further resources will enable us to improve the benefits we offer. While a formal succession plan exists for the CEO, succession plans or emergency coverage plans are not yet in place for other leadership roles. There is also opportunity for further improvement of governance, with clearer expectations of board members needed to fully harness the talent and energy of individuals, and stronger processes needed for continuous board self-evaluation and succession.
1. Sustain strong staff and culture while adding targeted capacity.

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<td>Grow the team to support key strategic initiatives</td>
<td>1. Add full-time employees as needed: Major Gift Officer/s, Community Engagement Officer, Advocacy &amp; Government Relations Lead, Program Officers, Book Keeper etc.</td>
<td>• Key positions filled as they emerge</td>
<td>CEO</td>
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<td>Establish succession/coverage plans</td>
<td>1. Establish succession plans and emergency coverage plans for everyone on the leadership team</td>
<td>• Succession/coverage plans completed</td>
<td>Finance &amp; Operations Coordinator</td>
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| Cultivate and maintain high performing staff         | 1. Continue to conduct annual salary benchmarking and strive to pay average or above averagesalaries.  
2. Invest in additional benefits to staff: 401(k) match, disability, FSA, and professional development funds  
3. Highlight clear pathways for career growth within PA USA and allow for regular professional development opportunities. | • Activities completed as listed                                 | CEO, Finance & Operations Controller |
| Build strong practices in HR, continue to work on culture, and staff cohesion in a hybrid environment | 1. Continue to implement regular performance reviews and work with staff to create performance development plans.  
2. Introduce annual staff engagement survey, discussion and problem-solving sessions.  
3. Continue to introduce HR policies and procedures | • Have clear industry leading policies and procedures in the areas of:  
  - Staff recruitment and onboarding  
  - Compliance, Safety and Health Regulations  
  - Clear compensation and benefits structure  
  - Maintaining positive employee relationships through proactively engaging with employees  
  - Comprehensive HR training curriculum and | CEO, Finance & Operations Controller |
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<th>Schedule for Employees</th>
<th>Performance management tools and processes</th>
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<td>- Up to date</td>
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<td>• Annual staff</td>
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<td>engagement survey</td>
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<td>results (90%</td>
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<td>Satisfaction)</td>
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<td>• Staff retention</td>
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<td>• Uniform policy</td>
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<td>and process for all</td>
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<td>arising HR matters</td>
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<th>Build Strong IT Department</th>
<th>Finance &amp; Operations Controller, IT Architect &amp; Systems Manager</th>
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<td>1. Ensure we have Physical and Logical Security</td>
<td>We have clear policies and procedures to ensure:</td>
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<td>2. Ensure regulatory compliance</td>
<td>• Ensuring that all procedures are well-documented, Testing software that deals with sensitive information, Looking for holes in our firewall or intrusion prevention systems, Making sure that we are storing sensitive data separately, Checking that wireless networks are secure, Scanning for unauthorized access points, Ensuring proper access control, that is checking the identities of users and ensuring that they have the proper credentials to access sensitive data.</td>
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<td>3. Undertake regular Data Backups</td>
<td>• What are the regulations we must comply with as a nonprofit? We need a clear checklist that sets out all requirements of each regulation.</td>
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<td>4. Create process for hardware management</td>
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• We need a review of how to and how often we back up critical data in our IT audit checklist. Data backups should be part of our disaster recovery and business continuity planning. This helps ensure we’re prepared for potential natural disasters and cyberattacks.

• We should determine: When we last tested our backup method? How long it would take for our current data backup system to recover? What is the financial cost of downtime to us? Do we have a copy of our data offsite or in the cloud?

• Develop a comprehensive inventory of our company’s hardware, noting the age and overall performance demands of each piece.

• Inventory should be maintained in an asset management system with a configuration management database (CMDB).

• An IT audit will confirm the health of our information technology environment. It also verifies that IT is aligned with the objectives of the business and that our
The main goals of the IT audit are to ensure that our data is adequately protected, our hardware and software are appropriate and effective, and the team has the tools it needs to do its work. An IT audit will help us uncover potential information security risk and determine if we need to update our hardware and/or software.

We want to move away from tracking all programs data on excel sheets – need to utilize Salesforce or alternative software tools to track and analyze the information we’re collecting and evaluating across the projects.

2. Sustain strong board and continually improve governance.

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| Sustain a high performing and diverse board with a focus on continuous improvement | 1. Clarify and enforce expectations of all board members, including “give or get” funding requirement  
2. Solicit individual board member roles/commitments to fully harness talents and contributions  
3. Deepen the pipeline of board candidates and implement clear succession plans  
4. Implement an evaluation process for the board that includes staff and board member feedback. | $ amount of Board member donations and “get” (self-reported) (Target: $10,000 total per Board member per year)  
• Strong pipeline of Board candidates (Target: 5-10 candidates in pipeline; rolling)  
• Board evaluation survey results (Target to be established after first year evaluation) | Board Chair, Board Secretary, CEO |
|-------------------------------------------------|---------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-------------------------------------------------|
| Maintain existing strong practices in governance | 1. Introduce term limits (x years) and engage and incorporate new board members regularly.  
2. Continue to implement governance committee processes to engage new members.  
3. Adhere to regular elections and roles and responsibilities charted by bylaws.  
4. Build and maintain committees including resource development committee, finance committee and governance committee. | Processes completed as listed | Board Chair, Board Secretary, Board Treasurer, CEO |
**Key Priority 3: Ensure Sustainability** – Build PA USA’s financial sustainability to ensure longevity, allow for creativity and reduce dependence on low dollar donors.

*Successes and Challenges in past 5 years*

PA USA has built a strong network of individual donors across the country. In each of the last five years, PA USA has achieved substantial growth. This growth was mainly built on community events and digital marketing. In the last two years we have successfully attracted corporate match funding. Cash flow is healthy. In 2020, we were also able to successfully attract funding from foundations and DAFs.

However, at the time of writing we have only set aside 3 months of cash reserves, and unrestricted funding is limited, reducing our ability to invest in infrastructure and sustainability. PA USA is still reliant on a large number of small donations and the number (and size) of major gifts is also limited. Finally, we have not been successful in retaining a large number of our donors year to year, therefore forcing us to invest money and time on donor acquisition. Donor cultivation and stewardship activities have been limited due to resource and capacity constraints. We also need to secure our future by diversifying our revenue by attracting grants, introducing a planned giving department and opening an endowment fund.
1. Achieve a $18 million annual budget per year and maintain 12 months of unrestricted cash on hand by 2024.

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| **Fully implement a best-practice development plan to achieve financial goals** | - Annual budget/expenditures (Target: $18 million by 2024) 
- # of months of unrestricted cash on hand (Target: 10-12) 
- Total amount of funding raised (not including carry over) 
- Total amount of individual giving (restricted and unrestricted, including board members) 
- Foundation revenue (not carry over) 
- Total Fundraising Net (individual donors only) 
- # of active individual donors 
- # of new individual donors 
- # of Ambassadors 
- # of new LCE members 
- Total fundraising $ amount from LCE | CDO, Executive Director |
| 1. Continue to invest in key development infrastructure as needed | | |
| 2. Invest in prospecting and cultivation to build a much larger pipeline/database | | |
| 3. Launch new Ambassadors program to engage supporters who can connect PA USA to their own networks | | |
| 4. Continue to invest in relationship building with donors across all giving levels to increase retention rates | | |
| 5. Fully implement major gifts strategy for high net worth individuals and hire a ‘Planned Giving Lead’ | | |
| 6. Focus all proactive efforts on American Muslim donors; continue to receive non-Muslim donations opportunistically (and consider focused efforts for non-Muslim donor market in a future strategic planning cycle) | | |

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| **Strengthen Board engagement in development** | - $ amount of Board member donations and “get” (self-reported) (Target: $10,000 total per Board member per year) 
- Total % of Board member development commitments completed each year(Target: 90%) | Board Chair, CDO |
| 1. Support and hold individual Board members accountable for annual “give or get” funding goals | | |
| 2. Ensure Board members are actively engaged in individual activities as documented in annual commitment forms | | |
2. Secure future sustainability

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<td>Grants are a great funding resource. Over $50 billion dollars are awarded by foundations to charitable organizations every year. This does not include funding from government departments at the state, national and international level. We need add grant writing capacity to our team.</td>
<td>1. Recruit a qualified grant writer and invest in grant writing training for existing members of the programs department.</td>
<td>• In 2024 at least 10% of PA USA’s revenue should come from grants.</td>
<td>CEO, Senior Programs Manager</td>
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<td>Create a PA USA endowment.</td>
<td>1. Establish an endowment with $400k in seed funding by 2024</td>
<td>• Fully operational endowment fund with $400,000 in revenue.</td>
<td>CEO, CDO, Board Treasurer</td>
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<td>Fund Nonprogram Spend Via the Sustainer Society</td>
<td>1. Develop a three year plan for the Sustainer Society</td>
<td>• Have an annual revenue of $2.5 million from our Sustainer Society by 2024.</td>
<td>CDO, CEO</td>
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The PA USA Board, along with its CEO, will monitor and evaluate the implementation of this strategic plan periodically, to ensure that goals are being met and/or worked towards, and in order to discuss needed amendments as in the case of major landscape changes.

The overall goal of evaluating the strategic plan is to determine how well it has been implemented (including who, what, when, where and how activities were accomplished). The process for doing so will include 2 phases:

- **Annually:** Ongoing monitoring of trends that may be impacting the progress or lack of progress towards goals. This will include identifying individual goals and objectives that are progressing well according to the plan, and those that are falling short, and suggesting any actions or adjustments that may be needed for the plan to succeed. Such questions to be answered include:
  
  o Are the activities being implemented as planned? Why or why not?
  o What is facilitating or impeding implementation?
  o Did all activities fit within plan objectives?
  o Are there goal areas, objectives or strategies that are receiving less attention than others?
  o What do the results indicate as to how to improve?
  o Is there a need to amend the plan?

- **In Q4 of 2024:** A final evaluation after the plan is concluded to determine overall success and impact. Prior to the evaluation the Board should nominate a lead and other members responsible for reporting, gathering, and evaluating data. A timeline for completion should be created. Lessons learned shall be incorporated into next strategic planning process and document.