

CASA Strategic Plan Action Plan (Appendix A)							
Completion/Next Review Date						COMPLETED 6/30/2019 (NO FURTHER REVIEW)	
Overall Completion Rate (as of 6/30/19, pending Board review)						96%	
Activity / Action Step	Responsibility	Start Date	End Date	Date Completed	Budget	Actual	% Complete
Goal 1: Ensure the long term sustainability of CASA							97%
Objective 1: Manage the HR plan to address staff, board and volunteer recruitment, retention and recognition programs	Norma Blackwell, Cathy Vrba	7/1/2014					100%
A1: Staff development	Norma Blackwell	7/1/2014	6/30/2019	6/30/2019			100%
A2: Create annual spreadsheets of staff and board continuing education credits	Cathy Vrba	7/1/2014	6/30/2015	6/30/2015			100%
A3: Deadline for annual staff reviews, include "learning goals"	Cathy Vrba	7/1/2014	6/30/2015	6/30/2015			100%
A4: Create staff review form specific to positions (based on job description)	Cathy Vrba	7/1/2014	6/30/2015	6/30/2015			100%
A5: Board development	JoAnne Germer	7/1/2014	6/30/2017	6/30/2016			100%
A6: Develop plan for Board accountability	Norma Blackwell, JoAnne Germer	7/1/2015	6/30/2017	6/30/2016			100%
A7: Volunteer development	Debbie Haynes	7/1/2014	6/30/2019	6/30/2016			100%
A8: Assess staff/volunteer level needs for 100% children served	Norma Blackwell, Kimberly Key	7/1/2014	6/30/2015	7/1/2014			100%
Objective 2: Enhance the succession plan for key positions							90%
A1: Prepare succession plan for Executive Director (include cross-training plan)	Norma Blackwell	7/1/2014	6/30/2015	5/31/2015			100%
A2: Prepare succession plan for Program Director (include cross-training plan)	Kimberly Key	7/1/2016	6/30/2019	6/30/2019			50%
A3: Prepare succession plan for Development Director (include cross-training plan)	Tricia Schneider	7/1/2016	6/30/2017	6/30/2017			100%
A4: Prepare succession plan for Finance Director (include cross-training plan)	Cathy Vrba	7/1/2016	6/30/2019	8/30/2018			100%
A5: Prepare succession plan for Training & Recruiting Director	Layla Coleman	7/1/2017	6/30/2019	6/30/2019			100%
Objective 3: Create a fund development plan to identify key funding sources							100%
A1: Create plan for Reserves (6 months)	Norma Blackwell, Cathy Vrba	7/1/2015	6/30/2018	6/30/2017			100%
A2: Create cultivation plan for corporate, church/civic and individual donors	Tricia Schneider	7/1/2015	6/30/2017	6/30/2016			100%
A3: Create plan to "steward" donors (calls, visits, etc.) and individual donor files to track contacts	Tricia Schneider	7/1/2015	6/30/2017	6/30/2016			100%
A5: Create plan to market and grow endowment and planned gifts	Tricia Schneider	7/1/2015	6/30/2019	6/30/2019			100%
A4: Plan Benevon model fundraising events	Tricia Schneider, Renee Lehmann	7/1/2015	6/30/2018	item removed - no longer a priority (NB)			
Goal 2: Implement and enhance infrastructure to increase CASA's overall effectiveness							100%
Objective 1: Enhance technology infrastructure to support the growth of CASA							100%
A1: implement donor database	Tricia Schneider	7/1/2015	6/30/2016	12/1/2015			100%
A2: enhance IT support	Norma Blackwell, Cathy Vrba, Tina Fotinopoulos	7/1/2015	6/30/2019	6/30/2019			100%
A3: phone system	Norma Blackwell, Cathy Vrba	7/1/2015	6/30/2018	6/30/2017			100%
A4: AV systems	Norma Blackwell, Cathy Vrba	7/1/2016	6/30/2019	6/30/2018			100%
A5: security	Norma Blackwell	7/1/2015	6/30/2019	6/30/2018			100%
A6: prepare spreadsheet of computers, etc. with dates of purchase and to replace	Cathy Vrba	7/1/2015	6/30/2016	6/30/2016			100%
Objective 2: Assess capital needs to support facility enhancement and future growth							100%
	Norma Blackwell, Cathy Vrba	7/1/2014					

A1: assess enhancements to the New Braunfels facility	Norma Blackwell, Cathy Vrba	7/1/2014	6/30/2016	3/30/2015			100%
Objective 3: Begin construction of new facility in San Marcos	JoAnne Germer, Norma Blackwell	7/1/2014					100%
A1: sign construction agreement	JoAnne Germer, Norma Blackwell, Tricia Schneider	7/1/2017	6/30/2019	12/31/2018, 6/30/2019			100%
Goal #3: Communicate to achieve maximum positive impact for CASA							100%
Objective 1: Enhance the Mission statement	Norma Blackwell	7/1/2014					100%
A1: address values of donors, volunteers and community	Tricia Schneider, Eloise Hudson	7/1/2014	6/30/2017	6/30/2016			100%
Objective 2: Create a trackable/measurable communications plan to enhance awareness	Eloise Hudson, Tricia Schneider, Layla Coleman	7/1/2014					100%
A1: increase public awareness (collaborate with Texas CASA on marketing campaign)	Eloise Hudson, Laura Torres	7/1/2015	6/30/2017	6/30/2017			100%
A2: explore different channels	Joyce Yannuzzi, Eloise Hudson	7/1/2015	6/30/2019	6/30/2019			100%
A3: create a differentiation strategy	Joyce Yannuzzi, Eloise Hudson	7/1/2015	6/30/2019	6/30/2019			100%
A4: position CASA as authority	Joyce Yannuzzi, Eloise Hudson	7/1/2015	6/30/2019	6/30/2019			100%
A5: use tracking data to determine best practices	Eloise Hudson, Laura Torres	7/1/2015	6/30/2019	6/30/2016			100%
Goal #4: Serve 100% of children in the CPS court system in our service area							88%
Objective 1: Determine needs	Kimberly Key	7/1/2014					75%
A1: project growth trends - plan	Kimberly Key, Tricia Schneider	7/1/2014	7/1/2014	7/1/2014			100%
A2: accept court appointment on every new child in CPS care	Kimberly Key	7/1/2014	6/30/2019	6/30/2019			50%
Objective 2: Educate stakeholders that CASA is a good investment	Norma Blackwell, Tricia Schneider, All Board	7/1/2014					100%
A1: Develop/share outreach materials (flyers, infographics, proposals, annual report) that define and illustrate CASA's value	Joyce Yannuzzi, Eloise Hudson	7/1/2014	6/30/2019	6/30/2019			100%