



Nine Month Engagement Plan

Oct- Dec. 2021

Jan- March 2022

Apr-Jun 2022

Organizational Assessment & Immediate Needs

- Qualitative Interviews: Appreciative Conversations
- Document Review/History (Bylaws, policies, procedures)
- Organizational Staffing Needs (Job Descriptions and Hours)
- Building and Production Needs
- Financial Statement Reviews
- Revised budget
- Ongoing Staff Meetings
- Workshop for new board (Findings Report from Appreciative Conversations and initial organizational assessment, AND vision setting)
- Recommendations to the new board on a Sustainability Plan (including staffing, infrastructure, facility, and funding streams)
- Based on approved Sustainability Plan and budget changes, proceed with hiring for needed positions and purchase needed equipment
- Ongoing communication with the board chair and board members
- Community outreach to partners and donors

Implement Processes

- Hire staff and provide onboarding and orientation
- Continue regular staff meetings and promote internal communications
- Ensure processes and systems are working, provide documentation and training
- Revenue generating strategies implemented
- Track all finances to ensure verification of revenue and compliance with grant requirements
- Continue to maintain ongoing communication with board chair and board members
- Continue community outreach to donors, partners, and sponsors
- Assess sustainability modeling
- Prepare grant applications

Refine Processes

- Continue to monitor progress and make adjustments
- Interim performance reviews based on agreed-upon success measures and job descriptions
- Report preparation for grant close-out
- Ongoing communication with board
- Chair and board members
- Continued outreach to partners, donors, and sponsors