High-Level Goal	Objectives	Initiatives	Dates	People	Notes
	where we want to go	*how we achieve our objectives*	*for check in / completion*	*who is responsible*	*what we need to know, tactical ideas, potential obstacles, etc.*
Enhance and Stabilize Financial Standing	Develop further capacity in Financial Management.	Create and manage an annual budget.	Each CY/FY	Bill, Trevor, Megan, Kevin, Kimberly	contingency planning for big repairs, etc.
		Create and implement succession plan for philanthropy and overall fundraising.	first quarter of 2022	Jerry, Tyrone, Derrick, Trevor, Kevin, Lisa	
	Build Financial Stability	Identify and rank strategic partners for fundraising.	2023		
		Develop relationships with new potential donors.			
		Reach out to identified potential partners to propose fundraising campaign (connected to Narrative Building below).			
		Identify best options for grant applications based upon desired outcomes and compelling narrative.			
		Reach out to identified donors with specific donation request.			

High-Level Goal	Objectives	Initiatives	Dates	People	Notes
Build out organization key roles	Develop a compelling narrative (for community-building, stakeholder/community engagement, for fundraising, etc.)	Work with a story teller to figure out how best to tell the story of Assisi House, and of the people in our community	Spring 2022	Lisa, Megan, Teka, Chris, Jerry	
	Develop Board Succession Plan	Create and implement strong onboarding process for new board members (narrative-building as a key part of this).	Now!	Deborah, Bill (financial), Lisa	Include current strat plan, past strat plan, budget and financial docs; establish a board buddy to ask questions to, do a tours of the houses, set up some community meals in the house in early January
		Begin process of transitioning existing relationships to additional board members and key staff (i.e., eventual Executive Director position)	2023		
		Create and implement Board/Staff/Volunteer committee teams delineated by function.	Winter 21/22	Lisa	
	Build out a team at the staff level to make sure the org runs efficiently/effectively, and alined with our values and goals; empower staff to run day-to-day operations.	Map existing staff and volunteer roles.	Winter 21/22, Spring 2022	Megan, Deborah, Tyrone	
		Create a job description for	Spring / Summer	Lisa, Megan, Teka	

		"Executive Director" role.	2022		
		Prioritize and implement a Facilities Manager/Point Person role - 1. draft the scope of responsibilites, 2. engage volunteer to take over this position in 2022, 3. think about eventually adding to a paid staff position	Winter 21/22	**Bill** to draft position / responsibilities	
	Explore other ways to keep the organization revitalized/engaged than just opening houses	Facilities manager to make a list of building improvements so that board members and volunteers can have opportunities to "be in the houses with a purpose," get to know residents, stay engaged, etc.			
		Create ideal organizational chart and phases for next three years.	end 2022	**Megan**, Tyrone, Deborah, Kimberly	
		Clarify what the role currently called "Case Manager" should look like: i.e., "Resources Coordinator", etc.			
		Create staff handbook that also outlines development and management practices.	2023		

High-Level Goal	Objectives	Initiatives	Dates	People	Notes
Engage meaningfully with all residents	Redesign/Re-launch Engaged Core Teams	Draft new model to test out for the next 6 months	January 2022	Megan, Teka, Kevin, Rochelle	
		Activities, "field trips," Community projects, shared weekly meals, etc.		volunteers, core teams	
	Explore other ways to keep the organization revitalized/engaged than just opening houses	Facilities manager to make a list of building improvements so that board members and volunteers can have opportunities to "be in the houses with a purpose," get to know residents, stay engaged, etc.			
	Build partnerships with other organizations to offer resources to residents	For current residents who need more/different support	start this, check-in on progress / plan in Summer 2022	staff (Megan)	
		For residents who might need to move to another type of housing with more support or different support		staff (Megan)	
	Design and Implement Wealth Building program		check in Summer 2022	Kevin, Rochelle; Teka will introduce Kevin to contact @ Justine Peterson	
Continue planning to and pursuing opening new residents houses	Same or different model: (single residents; level of independence; level of support/accompaniment; size/design of houses)	Perform best practices/case studies on House with Step Down (more support, harm reduction), and Step Up models	2023	Teka, Megan, Rochelle	

		check in with larger strategy/analysis aligned with Affordable Housing Score Card		Lisa, Derrick	
		Identify staff, volunteer roles we need to open future houses			
	Continue exploring various real estate development models	4-family building, individual or family flats? LOCATION! On our own or in partnership	2024	Jerry, Chris, Kevin, Tyrone, Derrick, (Rochelle and Lisa as needed)	
		Talk to MTUG (Sayer Johnson) about a lgbT house	Spring 2022	Lisa, Rochelle	