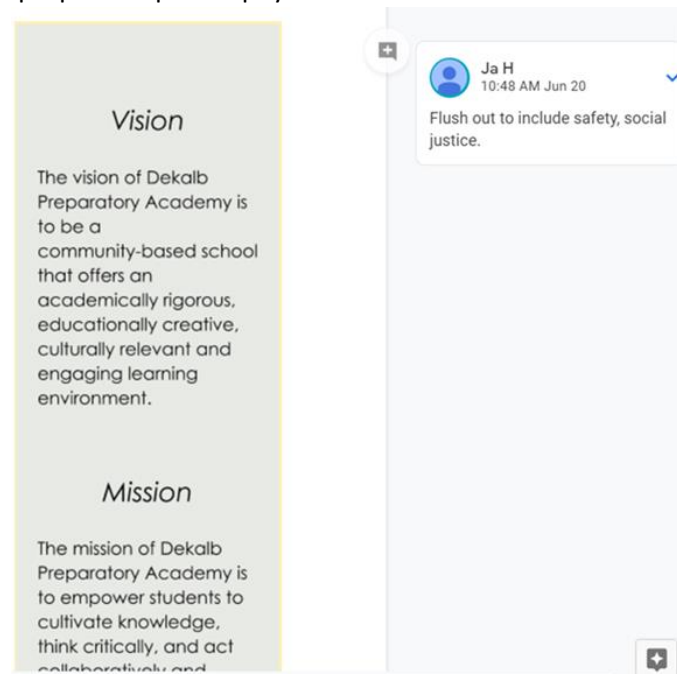


The following document is a checklist which outlines the strategic planning best practices and plan components that are necessary for the Development Team to design fundraising objectives and strategies that are strategically aligned with DPA's mission, vision, goals and budgets. Development & Fundraising goals and objectives can be clarified or established when they are based on the official mission and vision, as well as actual goals, strategies, our capabilities and progress thus far. Of course, it always makes sense for our organization to have a direction and order, but this is a particularly good time to undergo this process. This is the right time for DPA because:

- DPA is starting to define our current needs and initiatives to begin working in a new direction.
- DPA is moving into a new phase of an ongoing effort in academic achievements.
- DPA is also applying for new funding, from new and current funders. It's important under these circumstances to clarify our vision and mission so that any funding we seek supports what we stand for. Otherwise, DPA can wind up with strings attached to the money that require you to take a direction not in keeping with our school's real purpose or philosophy.



1. Vision & Mission Statements Checklist:

- ☒ You have shared your understanding of vision and mission statements with members of your organization
- ☐ You understand what is important to people in your community (Survey and/or Study Groups)
- ☒ You have decided on the general focus (topic and scope) of your organization (PBL & AVC)
- ☐ You have developed your vision and mission statements
- ☐ You have obtained consensus on your vision and mission statements
- ☐ You have decided how to use your vision and mission statements

2. Historical Plan Review:

Conduct a review of DPA's most recent strategic plan to assess items that have been achieved or that need to be revisited.

- a. The table below includes a summary of those Goals, Objectives, Strategies, etc. for assessment.

Category: **Development Excellence**

Goal: To encourage and strengthen relationships that support the mission and vision of DeKalb Preparatory Academy to positively advance the school.

Original Timeline	Priority Focus Area	Objectives	Objective met? (Y/N)	Tasks Completed	New Timeline
June 17- June 18	1.1 - Community Engagement	1.1.1-Increase the number of community partners in education from 2 to 6 by June 19	Y	2 of 3	June 20 – June 23'
June 17 – June 18	1.2- Enrichment Opportunities for Students Beyond Academic	1.2.1-Increase the percentage of enrichment opportunities academically, artistically, and athletically	Y	1 of 1 (Still in Progress?)	June 20 – June 23
June 17 – June 19	1.3 Engage Parents and Partners	1.3.1-Increase the percentage of actively engaged parents and partners in the schools PTO by 80%.	Y	5 of 5	June 20 – June 23

Category: **Governance Excellence**

Goal: To create an environment that attracts and retains a cadre of highly qualified and dedicated staff.

Original Timeline	Priority Focus Area	Objectives	Objective met? (Y/N)	Tasks Completed	New Timeline
June 17- June 19	2.1 – Admin. and Staff Development	2.1.1-Increase the number of leadership opportunities and roles for staff members to grow professionally.			
June 17 – June 19		2.1.2- Design and implement a differentiated professional development series to groom aspiring leaders at DPA			
June 17 – June 18	2.2- Systemic High Expectations	2.2.1-Increase teacher capacity to implement the standards at a level 3 or 4 on the DOK Scale.			
June 17 – June 18		2.2.2- Increase the percentage of proficient or higher teachers in TKES			

Category: **Academic Excellence**

Goal: To increase student achievement through the implementation of consistent rigorous and relevant instruction.

Original Timeline	Priority Focus Area	Objectives	Objective met? (Y/N)	Tasks Completed	New Timeline
June 17- June 19	3.1 – Georgia Standards of Excellence	1.1.1 - Improve students' mastery of standards on the Georgia Milestone Assessment			
June 17 – June 19	3.2- College and Career Ready Students	3.2.1 - Increase the percentage of students identified as college and career ready			
June 17 – June 19	3.3. Increase CCRPI	3.3.1. – To close the Achievement Gap between DCSD and the State of Georgia			
June 17 – June 19	3.4 AVC	3.4.1- Establish the Audio/Video/ Communication career pathway as the signature instructional program for the school			

Category: **Financial Excellence**

Goal: To create a safe nurturing and financially sustainable infrastructure that facilitates learning through the use of improved efficiency, productivity, technology, and best practices.

Original Timeline	Priority Focus Area	Objectives	Objective met? (Y/N)	Tasks Completed	New Timeline
June 17- June 19	4.1 – Improved Facilities	4.1.1-Improve Safe School practices and responses to emergencies			
June 17 – June 19		4.1.2- Improved Physical Plant			
June 17 – June 19	4.2- Technology Infrastructure	4.2.1- Improve Efficient and effective I.T. Practices and Operational Technology			
June 17 – June 19	4.3- Finance	4.3.1- Increase the percentage of cash reserves			

3. Review Priority Areas to redesign Strategy Map and develop Strategy Questions to which DPA can work toward an answer by the end of this planning process.
 - a. **Strategy Questions:** What are the four or five questions to which we can have unambiguous answers by the end of this process? (*EXAMPLES*)
 - i. Who is our constituency, and what do they need our organization to be doing right now?
 - ii. What kind of organization do they need us to be right now?
 - iii. How should we communicate with them regularly?
 - iv. Should DPA expand AVC Programs?
 - v. Should DPA seek to provide PBL at the Gold Standard Level?
 - vi. If DPA were offered \$200,000 to expand our campus, should we do it?

Often these questions lead to activities that are not just around units of service or reflect the role our school plays as a community focus points...not just as education service provider. Answering these questions helps us re-focus on who we represent and to whom we hold ourselves accountable. We must remember what makes our organization meaningful to all our constituents is not just to our board but to our families and funders.

b. Strategy Map Suggested Priorities:

Category	Priority 1	Priority 2	Priority 3
Academic Achievement	GA Standards of Excellence	PBL/AVC	College & Career Readiness
Access to Educational Services	Student Life Programs (Clubs, Athletics, Health + Wellness, etc.)	Service Learning	Service/Program Improvement or Expansion
Culture & Climate	Safe Learning Environment for All	Clear + High Standards for Excellence	Social + emotional support for all
Awareness (Engagement & Communication)	Stakeholder Communications	DPA Marketing & Awareness	Stakeholder Engagement Opportunities + Experiences
Development	Partnerships	Diversified Funding	Increased Funding
Organizational Management	Technology Infrastructure	Facilities	Finance
Human Resources	Board Effectiveness	Staff Effectiveness	Professional Development

4. Section 3 -Creating Objectives

- ☒ Your organization understands what objectives are, and when you should develop them
- ☒ Your organization understands that objectives should be "SMART +C" (Specific, Measurable, Attainable, Realistic, Timebound & Challenging)
- ☐ You have defined and reaffirmed your vision and mission statements
- ☐ You have determined the changes to be made
- ☐ You have collected baseline data on the issues to be addressed
- ☐ You have decided what is realistic for your organization to accomplish
- ☐ You have set objectives for the organization or initiative
- ☐ You have reviewed the objectives your organization has created



Academic Achievement:

Priority	Objectives	Strategies	Outputs	Staff Involved
GA Standards	Provide academically rigorous courses and/or pathways			
	Standards Mastery Improvement			
PBL/AVC	Gold Standard PBL			
	AVC Program Expansion			
College & Career Readiness	Increase % of students entering high school on the correct college & Career readiness path			

Access to Educational Services:

Priority	Objectives	Strategies	Outputs	Staff Involved
Student Life	Increase the percentage of enrichment opportunities academically, artistically, and athletically			
	Maintain and improve current clubs and other extracurricular offerings			
Service Learning	Develop Service-Learning Partnerships with local nonprofits like foodbanks and social justice organizations			
	Increase opportunities for all middle grade students to work with other nonprofits as well as on service projects for DPA			
Program Improvement/ Expansion	Ensure that educational facilities meet programmatic needs			



Culture & Climate:

Priority	Objectives	Strategies	Outputs	Staff Involved
Safe Environment	Create & maintain a safe and orderly environment for all			
High Standards	Establish & Maintain clear & high expectations for excellence for stakeholders			
Cultural Competency	Cultivate culturally responsive learning environments for all			
Social & Emotional Support	Provide support for social and emotional learning for all			

Awareness (Engagement & Communication):

Priority	Objectives	Strategies	Outputs	Staff Involved
DPA Marketing & Awareness	Ensure a broad awareness of DPA's mission, vision, programs and resources.	<ul style="list-style-type: none"> Define Programs Develop marketing messages to different audiences Appeal to individuals as well as companies to give of their time, resources and connections. Engage youth serving agencies of all kinds to become DPA volunteers & partners Develop a media content calendar 	<ul style="list-style-type: none"> Program Descriptions DPA Key Messaging organizations Marketing Collateral for solicitations New partnerships with youth serving organizations 	Resource Development Director; HoS, Principal
Stakeholder Communications and Engagement Opportunities + Experiences	Grow brand awareness and supporters through media and marketing strategies.	<ul style="list-style-type: none"> Provide stewardship reports (annual report) via web, social media and meetings with donors Create communication plan and calendar Create a marketing media/plan and calendar which is updated at least quarterly Leverage technology to communicate with stakeholders Seek feedback and testimonials of stakeholders, parents, scholars and donors. Publish testimonials on the web and use in marketing materials Develop website newsfeed that highlights, achievements of the academy & its scholars Add final strategic plan to website 	<ul style="list-style-type: none"> Increase in effectiveness of stakeholder engagement experiences Improved opportunities for innovative stakeholder collaboration Improved Communication 	Resource Development Director; HoS, Principal, BoD

Development:
Current Fundraising Priorities:

- **Technology** (i.e. AVC, School Technology Needs)
- **Annual Giving** (i.e. Focus on School progress)
- **Student Life Programs** (i.e. supporting Cocurricular Activities, Leadership Development & Service Learning)

Priority	Objectives	Strategies	Outputs	Staff Involved
Partnerships	Complete marketing and development admin infrastructure relation actions from FY19	<ul style="list-style-type: none"> • Finalize or complete all remaining FY19 action items required that can increase chances of securing funding awards • Improve development marketing communications to all constituencies. • Engage the volunteer leadership of the school, to establish a culture of philanthropy and cases for support. 	<ul style="list-style-type: none"> • Strategic framework with which to carryout development tasks. • Marketing & Communications strategies for full DPA plan. • Cases for Support 	Resource Development Director (RDD)
Diversified Funding	Enhance the current strategic development plan and create innovative approaches to fundraising.	<ul style="list-style-type: none"> • Launch an annual fund for individuals, including designing and implementing major gifts cultivation and solicitation processes. • Create special events to introduce the school to new audiences. 	-Annual Giving Campaign -Increased revenue from new donors and events - Special Events Funding Source	RDD, HoS, Board, Admin Staff
Increased Funding	Increase revenue from FDNS, CORPS & ORGS as well as GOV contractors as available	Obtain support from state and local government agencies, foundation and corporations.	FDN, CORP, ORG & GOV Partnerships & Funding	RDD & HoS

Organizational Management:

Priority	Objectives	Strategies	Outputs	Staff Involved
Technology				
Facilities	Improve & Maintain facility conditions	See Fund Action Plan	Increased funding revenue for strategic facilities repair or system replacement	
	Increase sustainable funding for facilities	See Fund Action Plan	Funding for facilities maintenance staffing	
Finance	Ensure Excellent Financial Management			
	Ensure Efficient use of Resources			



Human Resources:

Priority	Objectives	Strategies	Outputs	Staff Involved
Board				
Staff	Recruit Highly Qualified Staff			
	Develop High Performing Staff			
	Retain Highly Effective Staff			
Professional Development				

Funder Requirements

Community Foundation

DPA's goal is to become eligible for General Operating Support and Donor Advised Funding from the Community Foundation of Greater ATL.

Community Outreach

Organization participates in activities in the community in which it is located.

Organization demonstrates the ability to engage and communicate well with community members.

Fiscal Management

Organization's budget reflects priorities designated in its strategic plan.

Organization's board receives reports comparing budgeted vs. actual balances at least once each quarter.

Organization has at least three months of cash reserves.

Organization has an annual independent financial audit that conforms to generally accepted accounting principles (GAAP) or has certified financial statements that conform to GAAP.

Governance

Board has terms and term limits that are enforced, formal committees and written job descriptions for members.

Board membership reflects the skills needed to oversee a successful organization.

Annually, 100% of board members make personal cash donations or financially measurable in-kind contributions and conduct a self-evaluation.

Organization has a conflict-of-interest policy that is signed by board members annually.

Human Resources

Board of Directors, senior management and entire staff are comprised of diverse individuals who are committed to an inclusive and equitable organization.

Organization has written personnel policies that are distributed to all staff.

All staff, including the executive director, receive annual written performance reviews that include a personal conference with their supervisor.

Succession plans exist for leadership of the staff (executive director and senior leaders).

Marketing & Communications

Organization has a public relations plan and process in place.

Organization has a clearly stated policy on how it presents consumers to the public in presentations, publications and other media, including strategies to protect consumer privacy and confidentiality.

Organization has appropriate materials for use in public relations and marketing, and an established social media presence.

Operations

Organization has a technology and information infrastructure that supports operations and planning, aligned with its strategic plan.

Annually, organization dedicates adequate financial resources to repair, replace and regularly update technology.

Organization has financial systems, policies and resources that enable it to assess, plan for and control facilities-related costs in the short- and long-term.

Partnerships

Organization has established collaborative relationships with other organizations in the community that have been in place for at least one year.

These relationships involve significant activities, including establishing common goals, pooling resources, joint planning and evaluating services and procedures.

Organization has a process to formally assess collaborative relationships.

Policy and Public Will

Organization's leadership is articulate about the public policy issues and legislation that impact its stakeholders and its ability to provide services, build on assets + receive contributions.

Organization participates in civic activities designed to educate elected officials, policymakers and the public about the issues and strategies tied to its mission.

Program Management

Core programs are in alignment with vision and mission.

Organization measures results against outcomes.

Consumer/client input is used in making program revisions.

Resource Development

Organization has a resource development plan in place that reflects organization's mission and goals, assigns staff and board responsibilities and contains strategies for generating funds from diverse sources.

Board recognizes the role it must play in resource development and is actively engaged.

Organization provides acknowledgement letters to donors indicating the cost and tax deductible portions of certain contributions, like special events and some memberships.

Strategic Planning

Consumer/client input is considered in the planning process.

Strategic plan includes metrics to track and measure results.

Strategic planning takes into account and provides for procurement of resources necessary to achieve objectives.

Organization establishes an annual plan and objectives consistent with its strategic plan.

Staff and board measure organizational progress towards strategic planning goals through quarterly, semi-annual or annual written assessments.

Volunteer Management

Organization uses volunteers to expand and enhance services.

Organization screens individuals, conducting background checks as appropriate, and provides orientation, training, recognition and supervision for volunteers.
Volunteers have written job descriptions.

GuideStar

DPA is looking to obtain the GOLD/PLATINUM level, which is the next level in achieving the highest Guidestar rating. From the fully developed strategic plan, Development should be able to answer the following impact questions. These are the exact questions from guidestar.org as well as the basis for strategic planning answers required by funders.

1. What is your organization aiming to accomplish?

Clearly and concisely, state your organization's ultimate goal for intended impact. Identify the groups or communities you aim to assist, the needs your work is addressing, and your expected outcomes. Examine how your goals for the next three to five years (or an alternate timeframe specified in your answer) fit within your overall plan to contribute to lasting, meaningful change. When finished, ask yourself, "If someone unfamiliar with our work were to read this, would they have a clear definition of what long-term success means for my organization?"

Why is this answer important? Articulating your organization's long-term goals helps others understand your mission and intended outcomes. It also gives context and purpose to your day-to-day activities. Your response to this question is the foundation for your responses to the other four.

2. What are your strategies for making this happen?

Describe your organization's strategies for accomplishing the long-term goals you cited in your previous answer. Specify the broad approaches you employ and why your organization believes these methods will benefit your target audience or advance your issue. Lay out near-term activities that serve as important building blocks for future success, explaining how these elements strengthen your organization's strategic approach.

Why is this answer important? Clearly articulated strategies help those outside your organization understand how you aim to accomplish your long-term goals. Your long-term strategic approach also helps your organization determine appropriate near-term activities.

3. What are your organization's capabilities for doing this?

Detail the resources, capacities, and connections that support your progress towards long-term goals. While describing your organization's core assets, identify both internal resources (including, but not limited to, staff, budget, and expertise) and external strengths (including partnerships, networks, and influence) that

have contributed to, or will contribute in the future to, the accomplishment of these goals. Also include any future resources and tools that will further strengthen your work.

Why is this answer important? Identifying your organization's specific capabilities and how they are aligned with your long-term goals can help you deploy your resources effectively, giving stakeholders confidence that these resources are being utilized constructively. The purpose is not to list every resource, but to identify how your organization's capabilities, both internal and external, will contribute to your intended impact.

4. How will your organization know if you are making progress?

Explain key qualitative and quantitative indicators against which your organization assesses your progress toward your intended impact. In addition to describing what you measure, identify key milestones – what your interim targets are, and when you want to reach them – that signal progress and success. Include a description of your assessment and improvement process: the qualitative and quantitative methods you use as you monitor key indicators, and how your organization uses and will use that information to refine your efforts.

Why is this answer important? By definition, a long-term goal is not accomplished overnight. Monitoring key indicators and marking important accomplishments along the way help an organization stay on track, instill confidence in its methods, and let both internal and external stakeholders track movement toward achieving long-term goals.

5. What have you accomplished so far and what's next?

Demonstrate recent progress toward your long-term goals by describing how your near-term objectives are propelling your organization toward your ultimate intended impact. Go beyond the outputs of your work to make clear how these outcomes are contributing to fulfilling long-term goals. In describing both outcomes achieved and those not yet realized, include what your organization has learned about what does and doesn't work, what risks and obstacles exist, and what adjustments to goals, strategies, or objectives have been made along the way.

Why is this answer important? Sharing the outcomes of recent work offers an opportunity to reflect on your organization's purpose, while affirming that progress that has been made toward long-term goals. Focusing on outcomes—and not just outputs—also improves your organization's ability to identify important strategies and variables affecting pursuit of your ultimate impact.