

2018

Catalyzing Momentum for an Emerging Non-Profit

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Consultancy Project Executive Summary

Organization: Gardner-Webb University School of Education

Project Title: Catalyzing Momentum for an Emerging Non-Profit

Candidate: Gregory Shull

Consultancy Coach: Dr. Jeffrey Hamilton

Defense Date: July 2, 2018

Authorized by: Dr. Carolyn Jackson, Executive Director
The Banker's House

Acknowledgments

“Iron sharpens iron, and one man sharpens another.” Proverbs 27:17

I began work on my doctoral degree in August 2014 in the area of Educational Leadership. Although the course works were rigorous and enlightening, it was difficult to find purpose from the venture. I made a fortunate discovery during the summer semester in hearing about the Organizational Leadership in Education program from Dr. John Balls, a mentor, and friend. I am likely one of very few who have ever transferred from one doctorate program of study to another but found my place among those who could help sharpen me personally and professionally.

Please let it be known that I wholeheartedly appreciate the opportunities provided to me by Drs. Doug Eury, John Balls, and Jeff Hamilton as they approved and assisted in my transition to the Organizational Leadership program while providing a means for making sure I could do so financially and successfully.

Foremost, I appreciate the support of my devoted wife Amy, beautiful daughter Reagan, as well as my cheerleading mother Cindy, and generous father-in-law, Gary, who all contributed in many ways in helping make this project possible. A special thank you also to Dr. Carolyn Jackson of The Banker’s House for her sincerest trust and guidance in working with me on the project, Drs. Stephen Fisher and Brian Hunnell of Cleveland County Schools for their mentorship and friendship, and to my professors at Gardner-Webb University for the many rewarding and energizing experiences. Finally, I thank Conrad Martin, Erin Cook, Meredith Garrett, Greg Grier, Worley “Nick” Johnson, Tuan “Archie” Nguyen, Ralph Patin, and Chance Witherspoon, my cohort members, for their shared wisdom, encouragement, and unconditional support.

Abstract

Catalyzing Momentum for an Emerging Non-Profit

The purpose of this project was to lead The Banker's House through a strategic planning process. Our overarching goal was to systematically plan for the self-sustainability of The Banker's House organization. Through the strategic planning sessions, four committees were established as well as sub-goals for reaching toward organizational self-sustainability. The four committees – Program Development, Finance & Operations, Marketing, and Quality Assurance – have own their strategic initiatives and provide an organized approach to measuring and monitoring progress. A new organization mission statement emerged early in the process, guiding the formulation of the committee goals. Over the three-year consultancy experience, the organization has achieved nearly all goals noted on the three-year plan and will soon undergo another strategic planning experience at the conclusion of 2018. The consultancy experience catalyzed momentum for the organization by providing a partner at no expense to help create, plan, organize, deliver, mobilize, and execute a strategic planning process that qualified the goals for organizational success.

Keywords: The Banker's House, strategic planning process, committees

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1 Introduction

1.1 *Project Purpose*

The purpose of this project was to lead The Banker's House through a strategic planning process in an effort to plan ways for the organization to become self-sustainable.

In 2015, the organization did not have a clear mission or vision and relied heavily on the contributions of those closely related to the Blanton family -- former residents of The Banker's House -- also known as The Banker's House Foundation Board. The Foundation Board desired for the organization to plan for future sustainability without the need for financial support from the Board. This change would require an outside consultant provided by Gardner-Webb University to organize and execute a change initiative to guide the organization toward attainable goals for achieving eventual self-sustainability.

1.2 *Associated Documents*

- 1.2.1. The Banker's House Mission Statement
- 1.2.2. The Banker's House Strategic Plan (Committee Goals)

1.3 *Project Plan Maintenance*

Once created, the organization's strategic plan addresses several points of interest made into the form of measurable goals by the Foundation Board, the Advisory Council, and the community stakeholders. The goals were established to pave the way toward self-sustainability and short- and long-term organizational development.

Plan Monitoring:

- The Strategic Plan Committee Chairs delivered monthly updates to the Advisory Council
- Advisory Council discussed progress on goal attainment
- The Marketing, Program Development, and Finance & Operations committee met monthly; Quality Assurance committee met quarterly
 - The committee plans were reviewed each month and revised as needed based on the organization's fluidity and fast-paced goal attainment
 - Some goals became obsolete quickly and were removed from the Plan
 - At this time, nearly all goals have been met and it is time to begin a new strategic planning process to create a new three-year plan for the organization

2 Project Scope

2.1 *Outlining of Partnering Organization's Objectives*

- Lead the Banker's House through a strategic planning process
 - Gather input and feedback from stakeholders
 - Lead formulation effort of a new mission statement
 - Help form committees and establish committee chairs
 - Guide committees through creation process of strategic goals aligning with the organization's new mission
- Assist in monitoring and measuring goal attainment
- Help provide reports/updates to the Advisory Council on committee progress
- Modify strategic goals based on progress and pace
- Provide consultation to the organization on a variety of other needs in an ex officio capacity

2.1.1 *Success Criteria (Goals)*

Marketing Goals

- Goal 1: Increase awareness of public events and rental space for private events
- Goal 2: Create a public education presentation
- Goal 3: Develop a social media and communications strategy
- Goal 4: Develop a Separate Webpage for Weddings

Program Development

- Goal 1: Conduct Market Research
- Goal 2: Historical and Educational Information communicated often about the house
- Goal 3: Fundraising Event Series
- Goal 4: Determine Community Needs
- Goal 5: Partnerships With Area Attractions

Finance & Operations

- Goal 1: Banker's House finances and operations will demonstrate the highest level of fidelity
- Goal 2: Banker's House will show adequate and effective governance
- Goal 3: Banker's House Board will create supporting committees for specific functions

Finance & Operations

- Goal 1: The Banker's House will provide diverse experiences that compliment other entities in the community.

- Goal 2: Increase Volunteerism with The Banker's House
- Goal 3: The Banker's House will be an excellent environment to work, perform, volunteer and visit.

2.1.2 Risks

The Banker's House welcomed the consultancy project as they recognized that their long-term dreams for the organization could not be made possible without a roadmap for success. They also knew that without the consultant, the organization would very likely continue to rely too heavily on the personal financial assistance of the Foundation Board.

2.2 Outline of Student's Objectives

2.2.1 Objectives

The scope of the project was to lead The Banker's House through a strategic planning process. It was the responsibility of the consultant to gather input and feedback, lead the formulation of a new organizational mission statement, guide committees through the creation process of strategic goals aligning with the organizational mission, help monitor and measure those goals, and report progress to the advisory council on goal attainment. Throughout the reporting period of the consultation, guidance would be provided in making sure organizational goals are obtained or adjusted.

2.2.2 Success Criteria

Three measures of the consultancy project include the consultant's ability to:

- Complete a strategic planning process deemed a success by the organization
- Remain in good standing throughout the three-year term while contributing to organizational goal attainment
- To help the organization navigate toward self-sustainability

2.2.3 Risks

See section 2.1.2 and Table 7 to in section 6.1 of the Executive Summary.

2.3 Definitive Scope Statement

The focus of the consultant project is to lead The Banker's House through a strategic planning process to provide a roadmap for organizational self-sustainability.

The scope included:

- Leading the Banker's House through a strategic planning process and help define organizational, mission-driven goals.
- Organize committees to assist in executing the goals while providing a necessary amount of volunteerism

3 Deliverables

3.1 To partnering organization

The consultant's timeline for phases one through five are shown in Table 1 along with the timeline for completion. The final project phase was the ongoing measuring, monitoring, and reporting progress toward goal attainment.

Table 1

Project Timeline

<u>Phases</u>	<u>Description</u>	<u>Start/End Dates</u>
Phase One	Meet with the advisory council to facilitate the creation of the mission and vision	December, 2015
Phase Two	Form the committees – based on interest – for goal planning	January, 2016
Phase Three	Meet with committees to create measureable goals	March, 2016
Phase Four	Create a comprehensive strategic business plan for The Banker's House based on committee input	March-April, 2016
Phase Five	Monitor, assessing, and modify the strategic plan at the direction of The Banker's House Advisory Council	Ongoing

Organizational Committees

- Committee Chairs were determined at initial kickoff meeting
- Committees met regularly to determine progress toward goal attainment
- Committee members also volunteered at organizational events regularly to ensure short-term successes

3.2 From Student

Throughout the three-year consultancy project, the student provided the following to the organization:

- Led the organization through a strategic planning process
 - Gathered input and feedback from stakeholders
 - Led the formulation of a new mission statement
 - Helped form committees and establish committee chairs
 - Guided committees through creation process of strategic goals aligning with the organization's new mission
- Assisted in monitoring and measuring goal attainment
- Helped provide reports/updates to the Advisory Council on committee progress
- Modified strategic goals based on progress and pace
- Provided consultation to the organization on a variety of other needs in an ex officio capacity

4 Project Approach

4.1 Project Lifecycle Processes

The project was divided into a five-phase process to ensure the organization and consultant would experience successes along the way while chipping away at a variety of achievable goals. Phase one consisted of guiding the creation process of a mission statement for The Banker's House. Phases two through four involved leading the creation process of the strategic plan alongside volunteer committees. The final phase entailed the monitoring, assessing, and modification process of the strategic plan.

4.2 Project Support Processes

The individual phases of the project were monitored and assessed to provide updates to the Advisory Council on goal attainment. As goals were obtained and The Banker's House advanced at a pace faster than anticipated, the goals were modified and/or removed as needed under the direction of the executive director.

4.3 Project Support Processes

The executive director of The Banker's House served as the site supervisor and provided a great deal of support, trust, and leeway to lead the strategic planning process for the organization with full support of the organization. Both the consultant and the site supervisor also worked collectively to ensure the processes and procedural approach was the ideal fit for the organization as well as the consultant.

4.4.1 Project Team

The project team consisted of the consultant, the site supervisor (executive director of The Banker's House), an advisory council, variety of working committees, the Gardner-Webb University supervisor/advisor, and the Banker's House Foundation Board. Hierarchically, the Foundation Board provides oversight to the advisory council that was led by the executive director. Members of the advisory council chaired the committees.

4.4.2 Mapping Between The Banker's House and Consultant

The consultant worked alongside the executive director as a sounding wall, think partner, and was treated as an equal in the decision-making process. The consultant's relationship with the organization can be attributed directly to the site supervisor's strong, unwavering leadership.

5 Communications Plan

The intent was to ensure the consultant was the project lead for strategic planning while making sure the organization could function as if the process was a logical progression toward self-sustainability.

The notable communications included meeting with the advisory council and to facilitate the creation of the mission and vision with the committees, meet with the individual committees initially to create measurable goals and periodically throughout the three-year project to ensure organization was on target for goal attainment, and to attend monthly advisory council meetings to report any advances, delays, or modifications to goal attainment per meetings and conversations with the committees. Additionally, the consultant stayed in contact with the site supervisor to aid the organization in a variety of tasks necessary for short- and long-term success.

6 Work Plan

6.1 Project Support Processes

See Section Table 3 to in section 9 of the Executive Summary.

6.2 Resources

The Banker's House provides training opportunities for volunteers on an as-needed basis. Otherwise, all resources are in the form of mentors from a human resources capacity. Other resources included the organizational leadership program teachers from Gardner-Webb University. Drs. Hamilton and Eury provided specific guidance to the consultant to ensure a strong beginning phase of the strategic planning process. Moreover, Dr. Carolyn Jackson of The Banker's House provided assistance along the way and helped lobby for funds if and when a special project arose that would require an independent budget.

7 Milestones

Table 2

Milestones

<u>Milestone Number</u>	<u>Title</u>	<u>Forecast Date</u>
1	Consultancy Purpose	December, 2015
2	Develop Project Objectives	April, 2016
3	Scope development	April, 2016
4	Develop Summary of business benefits	July, 2016
5	Develop Risk Assessment	December, 2016
6	Summary of facts	April, 2017
7	Develop Project Plan Outline	April, 2017
8	Forecast Estimated Budget	August, 2017
9	Quality Assurance Plan	December, 2017
10	Document Overall Plan	April, 2018
11	Final Project	July, 2018

8 Metrics and Results

See Appendices B-E of the Executive Summary.

9 Risks, Constraints, Assumptions

Tables 3, 4, and 5 display a variety of risks associated with the relationship between the consultant and The Banker's House as well as means for mitigating the risks. Additionally, a contingency plan was established to ensure the consultant could approach the project in an adequate amount of support and resources.

Table 3

Risk Assessment Table

<u>Risk</u>	<u>Risk Level</u>	<u>Risk Details</u>	<u>Action</u>
Lack of Competence	Medium	The Banker's House had no true gauge for the consultant's ability to complete assigned tasks.	Work closely with GWU program instructors to ensure a quality experience for The Banker's House.
Inefficient Time Planning	High	Consultant works a regular job, attends school, has a part-time job, another consultation project, and a family.	The consultant will work hand-in-hand with the consultancy advisor establishing a deliverable timeline and shared responsibilities to ensure work is completed as expected.
Lack of potential organizational interest	Medium	Organization has already worked with consultants who have yielded minimal results.	Leverage Gardner-Webb University reputation and program guidance to ensure consultancy success.
Lack of Resources	Low	Organization is working on a limited budget	The consultancy is free-of-charge for The Banker's House.
Political Risk	High	Consultant is involved in a high profile project	The consultant will provide regular progress reports to the client supervisor and GWU supervisor to ensure goals and duties align with the desired direction of both organizations and the consultant.

Table 4

Mitigation Plan

<u>Risk</u>	<u>Activity</u>	<u>Objectives</u>	<u>Action Details</u>
Lack of Competence	Education and Awareness	Classes, seminars, council, and committee meetings	Attend all GWU classes and seminars for better understanding of Strategic Planning. Attend and participate in all Banker's House council, sub-committee meetings, and planning sessions as well as events at the venue.
Time Commitment	Preventative Measures	Scale-back involvement in Outside activities	To enhance the experience for both the consultant and the client, the consultant retired from second job with a local sports team.
Lack of potential organizational interest	Preventative Measures	Increase Visibility	The consultant will help plan and attend events at the venue to establish a higher level of visibility near and around the organization.
Lack of Resources	Enhance Support	Involve Support Team	Student will involve GWU staff members to increase consultation accuracy to ensure proper program implementation.
Political Risk	Preventative Education	Structured Report backs	Consultant will request progress reports from the client and GWU to ensure consultation is meeting/exceeding expectations. Information will be reported to GWU for ease-of-mind.

Table 5

Contingency Plan

<u>Function</u>	<u>Contingency Planning</u>
Education and Awareness	<ul style="list-style-type: none"> • Intensify seminar opportunities • Schedule additional events at The Banker's House • Release consultancy 360 survey
Preventative Measures	<ul style="list-style-type: none"> • Resign responsibilities from 2nd job • Increase frequency of planning meetings • Volunteer at upcoming events at The Banker's House
Enhance Support and Preventative Education	<ul style="list-style-type: none"> • Meet with site supervisor weekly to until back on track • Consult with GWU staff often' report back, request critique • Meet with both site supervisor and GWU supervisor for informational alignment

10 Financial Plan

The financial budget required to plan and deliver consultation services, both for The Banker's House and for myself were actually quite minimal. My major responsibility was to plan and orchestrate a strategic planning process. This took very little resources. We had some expense in paper copies, no expense on rental space for the meeting, but invested many volunteer hours from both myself, and the organization. The Banker's House Executive Director is paid monthly and she worked quite a bit in helping me organize the meeting. As for the remainder of the process, the budgetary needs were exclusively dedicated to operational expenses of The Banker's House. However, through my involvement with the marketing initiatives, we invested up to \$100 on Facebook ads, \$400 on brochures, an additional \$100 per printed deliverable each quarter, and \$100 annually for the website online storage space during my website upkeep tenure. Again, these amounts were not affiliated with my services directly, but have been added to the organization's budget as part of my direct influence.

11 Quality Assurance Plan

The quality assurance committee was formed during the strategic planning process and developed the following plan as seen in Table 6.

Table 6

Quality Assurance Plan

<u>Strategic Goals</u>	<u>Strategies</u>	<u>Measures</u>	<u>Baseline</u>	<u>Target 2016</u>	<u>Target 2017</u>	<u>Target 2018</u>
Goal 1: Banker's House finances and operations will demonstrate the highest level of fidelity	Establish accounting policies and procedures and division of responsibilities for overseeing finances	Annual Review	N/A	Completed by December 2016	Reviewed and Updated before end of 2017	Reviewed and Updated before end of 2018
	Complete a pro forma budget analysis and audit for accuracy	Bi-annual Review	0	Completed by summer of 2016	Reviewed twice January 2017	Reviewed by January 2018
	Monitor facility and evaluate additional financial needs, capital improvements or maintenance/ replacement costs	Monitor projects transparently using MS Excel – include project, reason, budget, actual	0	Begin by August 2016	Complete listing of all projects reviewed monthly by advisory council	Complete listing of all projects reviewed monthly by advisory council
Goal 2: Banker's House will show adequate and effective governance.	Establish which committees are needed ~ Foundation Board ~ Advisory Council ~ Strategic Planning Com. ~ Volunteer Committee ~ Others as needed	Creation of committees and progress reporting of committees	6	Identify committee ambassadors to formulate and champion committees	Quarterly Committee Reports to Advisory Board	Quarterly Committee Reports to Advisory Board
Goal 3: The Banker's House will reconcile committee reports with strategic plan goals	Monthly review of goals	Report progress of goals with advisor council	0	N/A	Reassess/'re align Goals as needed	Reassess/; realign Goals as needed

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Appendix A

The Banker's House Mission Statement

"The Banker's House seeks to engage, entertain and educate by providing extraordinary events and inspirational encounters in a stunning, historic setting."

Appendix B

Table 5

Marketing Strategic Plan

<u>Strategic Goals</u>	<u>Strategies</u>	<u>Measures</u>	<u>Baseline</u>	<u>Target 2016</u>	<u>Target 2017</u>	<u>Target 2018</u>
Goal 1: Increase awareness of public events and rental space for private events	Paid advertising	Awareness Surveys	2015 Deliverables	Increase % awareness	Increase % awareness	Increase % awareness
	Press releases for all events	% of Awareness		Increase Social Media Impressions	Increase Social Media Impressions	Increase Social Media Impressions
	Posting for all events (web and/or social media)					
	Update chamber of commerce and CVB listings					
	New brochures					
Goal 2: Create a public education presentation	Video	School Visits (two-way)	N/A	Schedule 1 school visit to BH	Schedule 4 school visit to BH	Schedule 6 school visit to BH
	New photography	Share digital media with schools				
Goal 3: Develop a social media and communications strategy	Schedule updates of what is going on with the Banker's House. Show landscaping improvements, plans of what is to come, events, etc.	Number of Monthly Social Media Posts	2015 Deliverables	Increase % awareness	2016<% Awareness, likes, shares	2017<% Awareness, likes, shares
		Number of Likes/Shares		Increase Social Media Impressions		
Goal 4: Develop a Separate Webpage for Weddings	Focus on weddings differently than other events. Brides want to see just what interests them while planning. Develop a partnership with other venues who are more upscale and be the second choice that is recommended. Wineries who are turning down events due to scheduling would be good partners as well.	# of Partnerships Developed	N/A	Develop Webpage	Increase # of wedding	Increase # of wedding
		# of Weddings or Events Booked Webpage Designed			Increase Revenues	Increase Revenues

Appendix C

Table 6

Program Development Strategic Plan

<u>Strategic Goals</u>	<u>Strategies</u>	<u>Measures</u>	<u>Baseline</u>	<u>Target 2016</u>	<u>Target 2017</u>	<u>Target 2018</u>
Goal 1: Market Research	Look through previous research or online at similar rental venues to compare services and marketing strategy	# of venue contacts Validate/realign/create services to enhance offerings	Greg/Carolyn	N/A	Finalize research by September	Develop marketing strategies supporting the research
Goal 2: Historical and Educational Information often communicated about the house	Invite architectural students from colleges and universities to visit, survey, and share thoughts	FB analytics # of visits	Program Dev. Committee	N/A	Bi-weekly info deliverables 1 Visit	Continue info blasts 4 Visit
Goal 3: Fundraising Event Series	Schedule 3 events for fundraising. ~ Formal Gala ~ Garden Party (informal picnic) ~ Beer and Food Pairing Dinner	Actual planned events # of visitors Satisfaction Survey Ticket Sales	Program Dev. Committee	N/A	Beer and Food Pairing Garden Party	Beer and Food Pairing Garden Party Formal Gala
Goal 4: Community Needs	Survey Community Needs	List of Wants from Community # of events aligned to needs (satisfaction survey)	Program Dev. Committee	N/A	Plan 2017 events based on community needs	Reassess community needs upon event completions and plan 2017 events accordingly
Goal 5: Partnerships With Area Attractions	Bridal packages with Morgan & Wells to include tickets to visit Bankers House event Half off BH visit with Earl Scruggs Ticket	# of visits Increased revenues	Greg	1 partnership	Establish 1 partnership	Establish 4 partnerships Track effectiveness of partnerships

Appendix D

Table 7

Program Development Strategic Plan

<u>Strategic Goals</u>	<u>Strategies</u>	<u>Measures</u>	<u>Baseline</u>	<u>Target 2016</u>	<u>Target 2017</u>	<u>Target 2018</u>
Goal 1: Banker's House finances and operations will demonstrate the highest level of fidelity	Establish accounting policies and procedures and division of responsibilities for overseeing finances	Annual Review	John	N/A	Completed by December 2016	Reviewed and Updated before end of 2017
	Contribute to a three-year business plan for the Banker's House operations	Evaluate actual revenues and expenses compared to the initial business plan quarterly and annually	John/Travis	N/A	Completed by December 2016	Reviewed and Updated before end of 2017
	Complete a pro forma budget analysis and audit for accuracy	Bi-annual Review	Travis	0	Completed by summer of 2016	Reviewed twice January 2017

Appendix E

Table 8

Quality Assurance Plan

<u>Strategic Goals</u>	<u>Strategies</u>	<u>Measures</u>	<u>Baseline</u>	<u>Target 2016</u>	<u>Target 2017</u>	<u>Target 2018</u>
Goal 1: Banker's House finances and operations will demonstrate the highest level of fidelity	Establish accounting policies and procedures and division of responsibilities for overseeing finances	Annual Review	N/A	Completed by December 2016	Reviewed and Updated before end of 2017	Reviewed and Updated before end of 2018
	Complete a pro forma budget analysis and audit for accuracy	Bi-annual Review	0	Completed by summer of 2016	Reviewed twice January 2017	Reviewed by January 2018
	Monitor facility and evaluate additional financial needs, capital improvements or maintenance/ replacement costs	Monitor projects transparently using MS Excel – include project, reason, budget, actual	0	Begin by August 2016	Complete listing of all projects reviewed monthly by advisory council	Complete listing of all projects reviewed monthly by advisory council
Goal 2: Banker's House will show adequate and effective governance.	Establish which committees are needed ~ Foundation Board ~ Advisory Council ~ Strategic Planning Com. ~ Volunteer Committee ~ Others as needed	Creation of committees and progress reporting of committees	6	Identify committee ambassadors to formulate and champion committees	Quarterly Committee Reports to Advisory Board	Quarterly Committee Reports to Advisory Board
Goal 3: The Banker's House will reconcile committee reports with strategic plan goals	Monthly review of goals	Report progress of goals with advisor council	0	N/A	Reassess/realign Goals as needed	Reassess/realign Goals as needed