The Planning Team will have completed some form of a community needs analysis process, either formal or informal. This is extremely important as a planning tool, and will enable the Team to evaluate all the suggestions that will be emerging from various sectors of the organization where people have special programs that they want to see funded. It will also assist the Team to define priorities when there are building or renovation projects that are being considered by the Board of Directors. Once priorities are defined, the next step is to integrate such priorities into an action plan with appropriate strategies identified to accomplish the desired ends.

In the next section, one can view some sample Goals that the Team might be considering. These goals need to be broadly defined and should reflect the long-range Vision for the Future. The goals function to relate the financial Campaign to the fundamental Mission of the organization, relating back to that mission, and showing how the goals, when achieved, will fulfill the Vision and help further the Mission over time. The goals can have end results that reflect the future Vision over several years.

Next, sample Objectives may be viewed. Objectives are much more focused and are time specific. An objective will be measurable within a concrete timeframe. Each objective relates to a goal, and there may be more than one objective to help achieve a goal. Objectives may be defined by a specific constituency of the organization, or may be defined by budget category. But any objective must have a specific cost associated with its implementation, and should be framed by the budget year of the organization. Objectives may be progressively stated on a year-by-year basis.

Following this, we present some sample Strategies and Tasks. Each objective will have a sequence of strategies, and each strategy will tell the reader how the objective will be accomplished and by when. Thus, a strategy will be action oriented, and the result of the strategy will help accomplish the objective in a timely and efficient manner. The strategy will also indicate who will be involved, and can be evaluated for effectiveness.

Each strategy will require a series of tasks to be accomplished, and might even be outlined on a month-to-month basis over the course of the Campaign. The tasks are very specific, and will help the Leadership Team to assign responsibilities for implementing Strategies. The tasks provide guidance to those who are actually carrying out the Strategies, and will let the people involved know that "x" has to happen before "y" can be tackled. The whole sequence will assist the Leadership Team to evaluate why some things might be lagging within the overall timeframe.

These definitions are not sacrosanct. Any Team may want to adapt the proposed format for its own use that corresponds more closely to its specific Campaign planning situation. But when adjustments are made, we suggest that the basic definitions between Goals, Objectives, Strategies and Tasks should be maintained, going from the more general down to the specific, so that everyone will work with a common terminology and understanding.
If you have additional questions, we will be pleased to hear from you.

Sample Goals Statement

In fulfillment of our mission, we at [NAME OF ORGANIZATION] pursue the following broad goals:

- To enhance our physical facilities in order to support more effectively the various PROGRAMS of [NAME OF ORGANIZATION].
- To preserve and communicate the rich traditions of [NAME OF ORGANIZATION] heritage.
- To increase awareness of and support for our local, national, and worldwide PROGRAMS.
- To broaden and strengthen our visibility as a regional resource, and promote the PROGRAMS of [NAME OF ORGANIZATION].
- To enhance / expand / improve our education and community programs.
- To develop opportunities for fellowship within OUR ORGANIZATION and the extended community.
- To grow in membership.
- To provide for the long-term financial stability of [NAME OF ORGANIZATION].

(Note: The Planning Team should NOT attempt to include all of these goals, but to select three or four -- perhaps five at most -- for its Goal Statement. The cue should be the organization's Mission and Vision: to accomplish the Vision and carry forward the Mission, what are the three or four things that the organization must achieve during the next five or ten years?)

Sample Objectives:

In order to achieve our goals, we have established the following specific objectives, (some of which will be accomplished through a fundraising campaign):

- To (restore) (renovate) (update) (expand) the physical facility of [NAME OF ORGANIZATION] to accommodate the projected programs of the organization and its services to the community.
- To establish a program of new and existing endowments to provide designated funds, separate from operating funds, for the mission of [NAME OF ORGANIZATION].
- To develop and implement a long-range public relations plan designed to increase awareness of [NAME OF ORGANIZATION] and its programs within the community.
- To (organize) (revise) (enhance) and implement a graded education program in the community for (primary / secondary) (youth) (young adults) (older adults) that reflects and includes (specific values as appropriate).
- To grow the level of the annual operations budget by (20%) (30%) (100%) by the end of December (2010) (2012) (2015).
- To reach the level of full-time salary and benefits for the (department head/program executive, etc) by the end of December (2009) (20010) (2012).
- To expand the staff salary level for a full-time (program coordinator) by the end of December (2010).

**Sample Strategies and Tasks**

In order to achieve our objectives, we have established the following strategies, (some of which will be implemented through specific tasks in the Campaign):

**OBJECTIVE:**
To expand the physical facility of [NAME OF ORGANIZATION] to accommodate the projected programs and services to the community.

*Strategy (1):*

- Complete an architectural study with confirmed costs for a new educational building by June 30, 2009.
- Complete a financial feasibility study with realistic projections for capital giving by September 30, 2009.
- Complete an agency-wide information and education program relating to our Vision for the Future and expansion of educational programs by the end of December 2009.
- Complete a focused and comprehensive capital solicitation program within the alumni organization by the end of June 2009.
- Complete the design, contracting, and financing mechanisms by the end of September 2009.
- Complete building construction with the new facility ready for occupancy on September 1, 2010.

*Strategy (1) Tasks :*
Complete an architectural study with confirmed costs for a new educational building by June 30.

*Tasks :*
1.1 - Appoint Building Sub-Committee by April 15th; Letter of request to architects.
1.2 - Review responses from architectural firms, make procedural decision by May 15th .
1.3 - Review renderings with preferred architectural firm, confirm plans and costs by June 15th.
1.4 - Finalize adjustments and modifications with final costs to Board of Directors by June 30th.

Strategy (2) Tasks :
Complete a financial feasibility study with realistic projections for capital giving by September 30.

Tasks :

2.1 - Appoint Feasibility Sub-Committee by May 15th; Letter of request to consultants.
2.2 - Review responses from consultants, schedule appointments for interview by June 15th.
2.3 - Interview three prospective consulting firms, make contract decisions by July 15th.
2.4 - Supervise and facilitate feasibility study during July & August.
2.5 - Receive and review feasibility report & recommendations by September 15th.
2.6 - Make recommendation of Campaign goals to Board of Directors by September 30th.