



FY20-22 Strategic Plan

As of August 17, 2019

Executive Summary

At Make-A-Wish®, we are committed to our vision of granting the wish of every eligible child. To do that, we need a shared understanding of our enterprise roadmap. Over the past several years, our pipeline of children who qualify for a wish has steadily grown as more people become aware of the physical and emotional benefits that a wish can give a child. We expect this trend to continue. Across our enterprise, we all play a vital role in granting wishes to children who are here today, and those yet to be referred. Operating with a common roadmap and a commitment to the health of the enterprise will ensure success as we build for the future. The time is now for us to embrace our shared vision and seek solutions that move us closer to granting the wish of Every Eligible Child—Our North Star. Our Vision.

Strategic Plan Outline

Executive Summary	• Summary of the plan
Vision, Mission & Values	• Enterprise vision and Mission • Any local chapter vision/mission or values
Background & Situational Analysis	• Emerging Trends • SWOT Analysis • Immediate needs
Pillars & Initiatives	• Enterprise pillars • Chapter initiatives & Objectives
Financial Projections & forecasts	• Key Indicators of Financial Performance
Risk Mitigation and Communication Plans	• Risk Analysis • Communication Plan
Performance Dashboard	• Initiative scorecard / tracker of performance

Planning Outcomes

- Ground everyone on the current state and future direction
- Build an aspirational, but realistic roadmap to 20% growth over three years
- Address the key strategic issues and topics related to momentum and roadblocks to achieving growth
- Agree on how MAWSD will participate in Chapter-to-Chapter help

Planning Assumptions

Strategic Direction:

- Financially, MAWSD has sufficient resources/ reserves to fund the proposed growth plan.
- Wish demand is higher than we are currently meeting.
- Intention is to build a plan to increase mission delivery by 20% over the next three years.

Planning Process:

- Planning horizon is 3 years, from FY20-22.
- Planning framework will sync with the Make-A-Wish America Enterprise Plan (specifically the 4 Shared Pillars & Strategic Initiatives where relevant).

SITUATION ANALYSIS

Current State

Make-A-Wish San Diego is in an enviable position within the Make-A-Wish family. Performance against all key benchmarks such as expense ratio, wish cost, chapter reserves and wish fulfillment are all above average. Both the Board and staff expressed the organization has great leadership, a positive culture and the long-term conservative fiscal management has led to the current financial stability. With all of these solid building blocks in place, the organization is poised to grow its' number of wishes granted by 20% over the next three years, which would result in reaching every eligible child in the San Diego area. The challenges to overcome include reaching new donors and growing existing donors; increasing corporate contributions; adding much needed staff capacity as well as attracting/retaining new staff, board and volunteers.

Fulfilling wishes for the remaining 20% of those that are currently unfilled will require a different reach and skill set with staff and volunteers. The funds to support the reach to the farthest places in the county and the complexity of the wishes will be higher than the current average wish cost. To meet the need, there is opportunity to sustainably grow the donor base in the middle market and major gifts. Additionally, keeping an eye on the economy and political instability is a key threat to mitigate in the upcoming years.

Strategic Issues to Address

How might we enable MAWSD to grow 20% over the next three years to meet the growing need?

1. What are the opportunities and priorities to **fund the growth**?
 - Which high-performing events should we develop further, and which under-performing events should we eliminate?
 - How should we manage the reserves?
 - How do we increase fundraising to support the growth in the wish pipeline?
 - How can we improve messaging to the San Diego community?
2. How do we need to **organize ourselves for growth & sustainability**?
 - How do we ensure the organization is equipped with the right people?
 - How do we recruit and retain more staff / volunteers / Board members to sustain the high volume of wishes?
 - How do we engage with the local community and what partnerships could be beneficial to the organization?
3. Should we **invest in a facility that can support growth**?

STRATEGIC DIRECTION

MAW Mission – What is our purpose?

Together, we create life-changing wishes for children with critical illnesses.

MAW Values – How will we behave?

Child Focus – We always put wish kids first.

Integrity – We are honest, transparent, and respectful.

Impact – We deliver life-changing wishes.

Innovation – We are bold, imaginative and creative.

Community – We are a diverse group of people working together toward a common goal.

MAW Vision

Grant the wish of every eligible child.

MAWSD Big, Bold Vision (Future State)

Our Big, Bold Vision is to grant the wish of eligible child in San Diego in three years. From where we are today to that future state is a 20% increase in wishes or from 230 wishes in FY19 to 275 by FY22. Supporting that mission delivery is driven by the referral pipeline and supported by an increase in wish granters and funding as follows:

	<u>Wish Pipeline</u>	<u>Wishes granted</u>	<u>Wish Granters</u>	<u>Annual Budget</u>
2019:	295	230 (projected)	190	\$5.0
2020:	305	255	220	\$5.5
2021:	315	265	230	\$5.7
2022	325	275	240	\$6.0

To achieve our vision, we have identified the following four pillars and goals to be implemented in the next three years:

1. **INCREASE OUR REVENUE:** Sustainably funding 45 more wishes requires generating an additional \$1M.
2. **GRANT MORE WISHES:** Continue to increase referrals and strengthen partnerships.
3. **INSPIRE OUR PEOPLE:** Add three additional staff, 50 more wish granters and 10 new board members.
4. **ENHANCE OUR CAPABILITIES:** Determine the future home of MAWSD & evolve systems & tech to support growth.

Pillar #1: Increase our Revenue

Work together to acquire, cultivate and grow donors across the enterprise.

Goal: Raise an additional capacity \$1MM, increasing the total budget from \$5MM to \$6MM by FY22.

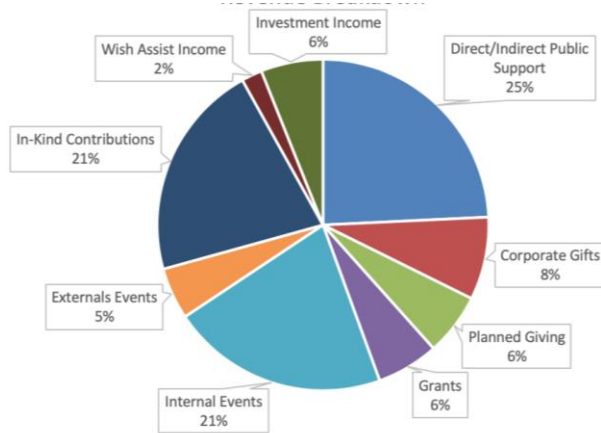
Our approach to achieving this goal is...

- Maintain a **balanced approach to growing revenue** across the following sources, while keeping the same percentage between cash and in-kind.
- **Strategically deploy funds** from our reserves to 1) Catch up with current demand and 2) Accelerate ability to generate the needed additional revenue by investing in new positions.
- Engage key donors and foundations about our “**catch up and keep up**” plans as part of our major gifts’ strategy.

Revenue Growth Strategies

Source	Potential	Approach
Direct Public Support & Major Gifts	Significant (^\$500K)	<ul style="list-style-type: none">• Focus on growing the middle donor, defined as \$250-\$10,000• Opportunity is to Just Ask! (Only 4% of donors said they were asked to give)• Continue current donor cultivation strategy
Planned Giving	TBD	<ul style="list-style-type: none">• Significant opportunity in the long term• Short term opportunity is pitching turning distributions into tax-exempt contributions
Corporate Gifts	Some	<ul style="list-style-type: none">• Target middle corporate companies because SD does not have a lot of large companies• Board assistance will dramatically improve success in this area
Events	Significant (^\$500K)	<ul style="list-style-type: none">• Grow Wine & Wishes as well as Trailblaze Challenge, knowing a challenge is staff capacity• Piggy pack on external partner events (e.g. Holiday Bowl, college events) to increase exposure and also limit staff requirements to host an event
Grants	Modest	<ul style="list-style-type: none">• Opportunity is to engage an external grant writer to secure one-time funds

FY19 Revenue Breakdown



FY22 Forecast



Guidelines for Strategic Deployment of Chapter Reserves

As of July 2019, MAWSD chapter reserves are around \$7.8M of which about \$6M is unrestricted. To fund the growth plan, the MAWSD Board approved the one-time use of \$500K with the following guidelines:

- Funds to be used for one-time needs, not ongoing.
- Program to expense ratio should not drop below 75%.
- Expectation is to deliver top line growth within the next two years.

Pillar #2: Grant More Wishes

Support wish granting and raise the level of awareness around the impact of a wish.

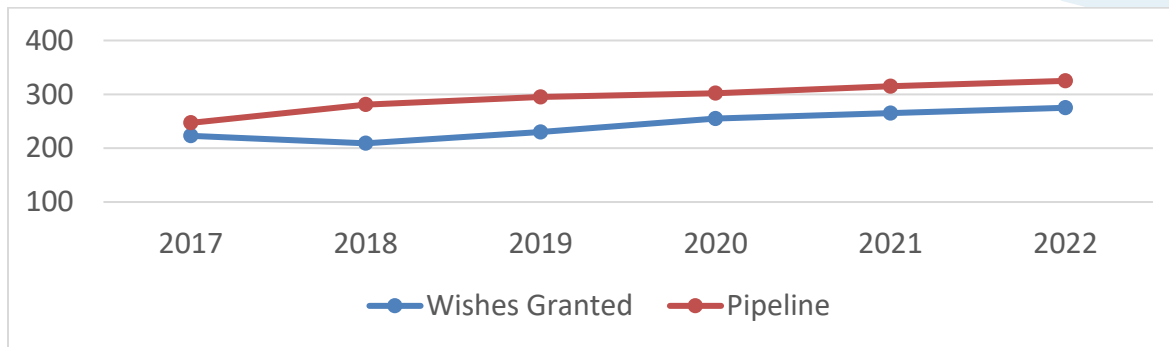
Goal: Grow wish granting by 20% to reach every eligible child; expanding our reach from 230 wishes to 275 by FY22.

Our approach to achieving this goal is...

- Maintain wish referrals such that the **wish pipeline is pacing at the the same rate** is wishes granted.
- **Continue the steady growth in our medical outreach** in the past two+ years due to 1) Adding key medical leaders to our board and advisory council; 2) The help of a new more automated referral process and 3) Adding a pediatric clinician to our staff ranks.
- **Supporting other chapters to enable wish granting will continue to be part of MAWSD's impact** to assist wish granting nationwide. On an annual basis, the Board will determine what the engagement will be including level of funding the Wish Fulfillment Fund, waiving Wish Assist Fees for struggling chapters, assisting in rush wishes, or

helping regionally. In the next several years, the Board will explore using Investment Income to support other Chapters such that every dollar raised in San Diego stays in San Diego

Wish Forecast



Pillar #3: Inspire Our People

Focus on growth and strengthening leadership throughout the organization to build and retain our talent.

Goal: Increase our capacity and capabilities by growing our staff, volunteers and board.

Our approach to achieving this goal is...

- To grow our Board and Staff , we will become the organization of choice for nonprofits in San Diego.
- **Add needed capacity through 3 staff positions:** Development (Development Manager), Wish Granting (Wish Support Coordinator or volunteer support – entry level position) and COO.
 - (1) **Wish Granting Coordinator:** In order to grant an additional 40 more wishes within the next three years (and sustain going forward), we add a full-time support position (Coordinator 1) in the wish department to manage administrative functions to free up the wish coordinators and wish manager, and possibly an additional part-time position to help manage the higher number of volunteers needed in FY21.
 - (2) **Development Manager:** From a revenue generation standpoint, adding 45 wishes along with the administrative positions to support these wishes and volunteers and our occupancy needs will require expanding our fundraising efforts measurably. We will generate hundreds of thousands of new dollars each year, and then sustain that growth going forward. Adding at least one position (Development Manager 1) to the development ranks will be necessary in the first year, and possibly in year two as well. This position will enable additional major gifts, corporate and foundation outreach to occur.
 - (3) **COO:** With a twenty percent increase in wishes comes an across the board increase in administrative activity, to include personnel, finance, data entry and donor and board stewardship. As many other mid-size MAW chapters have done, it is now time to add a Chief Operations position to provide important leadership and support, allowing the CEO to dedicate maximum time to donor, board and community engagement rather than less. With an office relocation in the coming year, the need for more support is critical.
- While we have added 50 qualified volunteers located in outlying areas of our territory as well as those with key language and communication skills, we will be **adding another 50 wish granters** before the end of FY20.
- As 50% of the Board will rotate in the next several years, **new Board Members will be selected through a Governance Committee** that will put in place the qualifications and considerations such as:
 - (1) Attracted to the Mission first
 - (2) Align Board Members with areas of opportunity in fundraising
 - (3) Establish a Give/Get “walk in door”
 - (4) Increase the Board’s diversity (ethnicity, origin, etc.)
 - (5) Be creative to attract new board members with high capacity and diversity
 - (6) Consider a bigger board
 - (7) Attendance requirements – cultural shift to be addressed by Governance committee

Pillar #4: Enhance Our Capabilities

Use technology and data as a foundation to advance our revenue and wish growth.

Goal: Determine the future home for Make-A-Wish San Diego.

Our approach to achieving this goal is exploring the following options with a Board Task Force:

- **Re-new Current Lease:** The lease for our current office expires in September of 2020. There may be an opportunity to add 1,000 +/- square feet to our space, although AAA is indicating a major increase in our monthly rent, regardless of adding extra space. If adding space in our current building is not a possibility or price competitive, then we will explore moving to another location.
- **New Building:** The cost of this expansion and the increase in our price per square foot will increase our occupancy costs significantly going forward. This may be the ideal time to explore purchasing a permanent home for Make-A-Wish in the region.
- **New Lease:** Depending on the current space options and what is available for purchase, a new lease is the third option to find optimum space that is about 1,000 ft larger than the current location.

Goal: Evolve systems and technology to enable our growth.

- Transition database from Raiser's Edge to Salesforce in FY20
- Transition from Financial Edge to new platform in FY20
- Wealthscreen larger percentage of donor database in FY20
- Add laptops to inventory to allow greater intern and staff flexibility within and outside of office

Pillar #1: Increase Our Revenue

Bold indicates high priority, strategic focus/growth area *Indicates alignment to national initiatives.

Chapter Goal		FY20	FY21	FY22	Board Engagement
Raise an additional \$1MM, increasing the total budget from \$5MM to \$6MM by FY22.		\$5.5M	\$5.7M	\$6.0M	X
#	Initiative & Champion	Metrics & Target			
1	Public Support & Major Gifts:				
2	Events – Trailblaze: Double the Trailblaze Challenge by cultivating current donors and acquire new donors. (WHO??)	<ul style="list-style-type: none"> • Net event revenue; \$XM • # of new donors; XX • X 	Milestone	Milestone	Milestone
3	Events – Wine & Wishes:				
4	Other: Maintain all other revenue streams at FY19 levels, such as Golf, Direct Mail, etc...				
5	Corporate Gifts:				
6	Planned Giving:				
7	Grants				
8	Community Outreach/Awareness				

Pillar #2: Grant More Wishes

Bold indicates high priority, strategic focus/growth area *Indicates alignment to national initiatives.

Chapter Goal		FY20	FY21	FY22	Board Engagement
Grow wish granting by 20% to reach every eligible child; expanding our reach from 230 wishes to 275 by FY22.	Wish Pipeline	305	315	325	
	Wishes Granted	255	265	275	X
#	Initiative & Champion	Metrics & Target			
1	Wish Awareness/Stories:				
2	Bilingual Staffing:				
3	Wish Costs:				
4	Chapter-to-Chapter:				
5	Referrals: Increase referrals from Naval Medical.				
6					
7					
8					

Pillar #3: Inspire Our People

Bold indicates high priority, strategic focus/growth area *Indicates alignment to national initiatives.

Chapter Goal		FY20	FY21	FY22	Board Engagement
Expand our capacity and capabilities by growing our staff, volunteers and board to increase wish grantors from 190 to 240.		220	230	240	X
#	Initiative & Champion	Metrics & Target			
1	Staff Growth: Add 3 additional staff to increase our impact and service capacity.				
2	Volunteer Growth: Increase volunteer pool by 50...				
3	Board Growth:	Form a Governance Committee.			
4	Staff Development				
5					
6					
7					
8					

Pillar #4: Enhance Our Capabilities

Bold indicates high priority, strategic focus/growth area *Indicates alignment to national initiatives.

Chapter Goal		FY20	FY21	FY22	Board Engagement
Secure a long-term home/facility for the MAWSD chapter's growth.					X
#	Initiative & Champion	Metrics & Target			
1	Current Space:				
2	Building Purchase:	•			
3	New Lease:				
Chapter Goal		FY20	FY21	FY22	Board Engagement
Evolve systems and technology to enable our growth.					
#	Initiative & Champion	Metrics & Target			
1					
2					
3					
4					

Risks & Mitigation Plans

Risk #	Risk Description	Effect	Mitigation	Impact	Probability	Level of Risk
1	Volunteers	If we are unable to increase the number of volunteers...				
2	Economic Downturn					
3	Staff Turnover					
4	Negative PR from another Chapter or National					

APPENDIX

SWOT

Strengths	Opportunities
<ul style="list-style-type: none"> • Positive culture that fosters collaboration and staff retention. • Staff and Board’s flexibility, dedication and passion to the mission when faced with challenges. • Strong leadership within the organizations. • Donor loyalty and positive relationships with the community reflected in community engagement, volunteerism and fundraising efforts. • Fiscally conservative management approach has afforded the organization financial stability. 	<ul style="list-style-type: none"> • Increase in middle and major gift donors and donor retention due to stewardship. • Consistent growth in wish pipeline/referrals. • Need for more funds to support growth and complexity of wishes. • Increased need for volunteers and volunteer recruitment. • Retention of enthusiastic, forward-thinking staff members. • Expansion into new donor markets through various channels. • Need to differentiate from other non-profits.
Challenges	Threats
<ul style="list-style-type: none"> • Reaching new donor markets and growing donor support of all existing donors. • Demand for more staff/volunteers/less turnaround to meet growth of wishes and organization. • Need for more physical space to meet growth. • Greater expectation & diversity of Board. • Debunking common misconceptions about perception as a “last wish” organization. • Decrease in donors due to high reserves. • Increased utilization of technology. • Barriers to reaching every eligible child. • Reduction in corporate contributions 	<ul style="list-style-type: none"> • Political and economic turbulence (particularly in tax policy changes) affecting donors. • Staff/Board cohesion and turnover. • Inefficient systems and hesitancy to embrace new technology. • Relationship with National. • Lack of resources to meet growing demands in a timely fashion. • Shifts the conception of and relationship to philanthropy with the new generation. • Volunteers that do not meet quality standards. • Competition from other nonprofits. • Threat of economic downturn • National wish granting ability is a threat to the brand

Board & Staff Insights – Survey Summary

Pillar #1: Increase Our Revenue - *Work together to acquire, cultivate and grow donors across the enterprise.*

Board	Staff
<ul style="list-style-type: none"> • Expand donor base, leverage Trailblaze. (5) • Increase marketing exposure, awareness and education within the local community through new advertising tactics. (5) • Increase outreach and events to the local community to boost involvement. (4) • Be creative with challenges and ask peers for new ideas. (3) • Achieving a diversified board with the capacity to donate more. (2) 	<ul style="list-style-type: none"> • Increase corporate and major donor contributions. (7) • Explore new and diverse ways to connect with untapped segments in the community. (6) • Elevate the quality and experience of major events. (5) <ul style="list-style-type: none"> ○ WINE & TBC as events are among our greatest opportunities for acquiring, cultivating & growing donors. ○ Identify where there is growth and momentum and focus our efforts in those areas (middle giving, TBC and Wine fundraisers). ○ More activities like the Trailblaze Challenge that not only allows individuals to donate and be physically active but also that give a sense of community to the participants. • Increase donor engagement. (4) • Create more buzz through story sharing via multiple channels. (4)

Pillar #2: Grant More Wishes - *Support wish granting and raise the level of awareness around the impact of a wish.*

Board	Staff
<ul style="list-style-type: none"> • Improve and increase marketing messaging and impact. (7) • Forge partnership with strategic allies and large sponsor brands. (2) • Tell the stories of the positive impact of wishes as demonstrated in the recent hospital study. (2) • Remove barriers from national MAW. • Gain insights to understand what is needed from MAW from families that have been through the wish cycle. • Break that belief that children must be terminal to qualify. • Other – Our pipeline seems big enough now... 	<ul style="list-style-type: none"> • Increased community involvement and engagement through publicizing wish cycle. (4) • Increase press coverage and media presence. (2) • Diversify Wish Coordinators and wish granting to serve bilingual families. (2) • Add team members that can plan high volume of wishes at quality levels.

Pillar #3: Inspire Our People - Focus on growth and strengthening leadership throughout the organization to build and retain our talent.

Board	Staff
<ul style="list-style-type: none"> • Adjust compensation and bonus structures to award higher performers and stay competitive with pay. (4) • Hire talented employees with specialized skills. (3) • Allow opportunities for professional development. (3) • No changes needed at this time. (2) 	<ul style="list-style-type: none"> • Provide opportunities for employee growth through professional development and training. (6) • Understand the workload and provide opportunities for employees to rebalance work/life balance to prevent burnout. (4) • Diversify & update Board requirements / succession planning. (3) • Create opportunity for internal promotions and incentivize growth within the company. (3) • Conduct leadership retreats that reenergize our commitment to the mission. (2) • Attend conferences as learning and growth opportunities. (2) • Greater transparency and opportunities for staff to provide input on the organization. (2)

Pillar #4: Enhance Our Capabilities - Use technology and data as a foundation to advance our revenue and wish growth.

Board	Staff
<ul style="list-style-type: none"> • Integrate new software for greater efficiencies in operational tasks. (5) • Host live casts of the organization’s work. (3) • Update the website / social media content. (3) • Leverage outside relationships for network help. (2) • Collect data from softwares to keep goals in sights. 	<ul style="list-style-type: none"> • Improve data entry / data base for accuracy, better reporting, and research. (9) • Invest in programs and personnel for data analytics & reporting. (6) • Seek innovative ways to collect gifts and communicate. (4) • Conduct trainings on tools, processes and technology. (4)

Chapter Operations – Staff only

Start Doing: What should we start doing as a Chapter, which if we did would have significant impact on our ability to fulfill our mission?

Hire more talented staff to meet demands of the growing organization and empower staff to be innovative in their jobs. (3)

- Teamwork: Support the wish department with more staff that is equipped to fulfill wishes in a high quality, timely and supportive matter. Allow the staff to work creatively, innovatively. Elevate events such as Wine & Wishes (fundraising events) to a higher quality in order to generate higher returns. Events such as walk are fun and magical but require enormous amounts of staff time and the return isn't as high. Maybe consider having more high-profile walks host events that will raise money on behalf of Make-A-Wish, such as Hot Chocolate who generate a third 1/3 of the proceeds of our annual walk with less staff and financial resources.

- Hire additional skilled, professional staff in the office instead of trying to fill huge gaps and huge amounts of work with interns who are switched out every 3 months
- Grow our staff to offer support to current staff and distribute workloads more evenly. Invest in data support to set up tracking/reporting systems in RE. Increase BOD give/get and stress individual/major giving, BOD must lead by example.

Utilize and engage with volunteers so that they create the greatest possible impact. (2)

- Better engage volunteers through professionalized communication and specific direction on how they can have the greatest impact. Send a survey to all constituents to get their feedback on our mission, standing in the community, fundraising tactics, etc. to help determine how best to appeal to them. Make more specific asks based on the info we learn in this survey
- Utilize our volunteers more and more as it will relieve the wish team of some of their work on wishes and help the development team in stewardship items.

Provide clear direction and tracking against goals, efforts and successes. (2)

- Provide clear direction at every level on future goals, projects, and initiatives. Also, focus on improving inefficiencies.
- Tracking across the board of our efforts & successes. Having specific reports in place that we use consistently from here forward. Start making it clear to the current and new Board members that if they join our Board, MAW must be a priority. So, attendance at meetings; attendance at gatherings and events; donor stewardship; all of these must be made a priority for them. They must buy a table at WINE or donate the equivalent.

Increase communication to increase donations. (3)

- Share the message of our children so our community truly feels compelled to donate, volunteer, and refer wish children.
- We should start pushing the case for support and get the word out. I love that we use our social media for wish stories and corporate sponsor shout-outs but with so many young adults transiting to donors and families who are looking for ways to give back, I think it would be beneficial to use our social media platforms as a way to teach our audiences about the many ways they can give back to the organization, financially or otherwise. Moreover, I think it would be beneficial to ask our board for more, especially since we will be adding so many new members this calendar year.
- Finding new sources of fund-and-friend raising (new corporate partners, in-kind donors for wishes, events). This is something we're already doing but can always be on the lookout for more!

Be proactive in finding solutions.

- Try to get ahead of problems before they arise. Be intentional about what problems we foresee in the future and invest in ways to prevent those. i.e.--outfitting all computers with the necessary programs to be effective, increase staff size before burnout occurs, provide training for how to go from daily tasks to big picture thinking, investigate the technology that we use and how we can utilize it more efficiently.

Invest in a larger space.

- Purchase (or lease) a bigger building

Stop Doing: What should we stop doing as a Chapter, which if we did would have significant impact on our ability to fulfill our mission?

Retaining poor performing volunteers. (2)

- Allowing Volunteers to make horrendous, catastrophic errors that cost us money and damage the wish experience for kid and families and continually keep them on as volunteers

- Continue holding on to volunteers who don't reflect our message or cause ripple effect problems (financial and emotional)

Renewing events / tools with little to no growth potential. (4)

- Stop trying to use tools that don't work. The Board Thank-a-Thons only work if Board members show up. If it doesn't work, stop trying to make it work. The Padres VIP Nights are an amazing stewardship and cultivation opportunity that donors rarely want to participate in. Let's stop trying to do that (as a rule) and rather, use 5-6 of them for volunteer appreciation. The volunteers always accept the invitations, but we should save one for donors and find other let's to manage those relationships. The Corporate Council doesn't seem to be taking off, so spend some time re-thinking how to get the corporate leaders interested and involved.
- Renewing events with little to no growth potential. Too much staff time for little ROI.
- Less events and focusing on an alternate plan to engaging those specific donors.
- Spending time and resources on non-mission critical areas.

Determine how to approach donors for donations. (4)

- Given the current case for support, I believe we need to stop feeling nervous about asking our loyal supporters to increase their giving - monthly, event, year-end, etc.
- Stop chasing donors or vendors who don't want to give/as much.
- Assume members of the community know how to get involved with MAW.
- Assume donors and potential referral sources understand our mission.

Micromanagement of staff.

- Some of the lower management can fall in to micromanaging, in order to continue working in a higher pace and creative flow, working with the ability to make a project your own is extremely important.

Do Differently: What do we need to do differently?

Evaluate the effectiveness of current internal financial management. (2)

- Looking at various fundraising events to see what is currently working and what might not be beneficial to continue.
- We need to stay the course and add resources in individual giving, because individual giving is like a flower that grows with the investment of time and love. I think we're on the right track in terms of investment in volunteer management. I think our internal financial management is an area that could use some help. We spend a lot of time and energy trying to track information on donations & process wish close-outs, without truly ever trusting what we get.

Increase open, meaningful communication with donors and families. (3)

- We are moving in the right direction, but I think our communications with donors need to continue to become more personalized and frequent.
- Work on communicating as whole versus 'wish side' and 'development side', whether that is through creating time for ideas and collaboration or having a specific retreat or activity.
- Vary the types of wishes and stories we feature in our communications (fewer travel wishes) -Engage more wish families to help tell our story

Increase the wish team staff and empower them in their jobs.

- We must hire more wish team staff, help our staff feel valued, and give them opportunities to grow professionally.

Hold staff and volunteers accountable.

- Not holding volunteers or staff members accountable for mistakes.

Create an environment where dissent is comfortable and people are able to positively challenge each other.

- Be willing to say no and ask why more.

Foster teamwork and collaboration between internal departments.

- Sometimes there is an "us vs. them" feeling between Development & Wish - I know we are already striving hard to do this, but we must remember we're all one team working toward the same goals!

Volunteer Effectiveness: What specific opportunities exist to strengthen the effectiveness and availability of wish-granting volunteers and non-wish granting volunteers?

Expand outreach & communications. (3)

- Continued volunteer outreach to acquire volunteers with a variety of language skills and other strengths that would help the organization. On boarding volunteers from various areas of San Diego.
- Media outreach - In-kind generating (needs) - volunteer bonding/collaborations
- A more formalized communication plan that provides more information, connections, and inclusion for all volunteers.

Be selective in accepting volunteers and onboarding.

- Volunteers need to be interviewed and evaluated before being onboarded to become wish granters. There is such a high demand to be involved with our organization and we must be more selective about who we bring onboard.

Increased communication of volunteer opportunities to create a cohesive volunteer base. (3)

- I think WISH Circle is in an interesting place right now where they are being given leadership roles as volunteers. I think this will allow us to bring in new women who would like to wish grant and champion many of our special events. Also, with our new Volunteer Manager NOT granting wishes, I think this will allow for more volunteers to be heard and feel supported by the organization. Furthermore, with the growing pipeline it is a critical time to make sure our volunteers are active and continually taking on wishes and airport greets. Lastly, many of the Trailblazers are interested in volunteering and I think now is a critical time to get them in the door while they are still on the TBC high.
- More volunteers in total and more opportunities throughout the year for them to engage with each other. I think TBC shows us the value of relationships among likeminded individuals, so allowing them to have more of a connection to each other is going to significantly increase engagement and positively influence their volunteer experience.
- Wish granters need to be given more notice for volunteering opportunities like backyard makeovers etc. so that we can provide them with a positive, organized, volunteering experience.

Formalize training of functions, roles, and responsibilities. (3)

- I think we need to do a better job at training our volunteers. At least some new volunteers do not feel confident in what they're doing and it's random if they get a good mentor or someone who spends time coaching them. If they don't, and if they're not super proactive on their own and they're really left hanging. We need to offer them opportunities for professional development like we do for staff. We need to be more involved.
- Ensure each volunteer understands their role & responsibilities. We must hold volunteers accountable for meeting those responsibilities and have the appropriate staff support for volunteers and a consistent feedback channel. We must also ensure our volunteer team closely reflects the makeup of our wish family population.

- Currently, volunteer orientations are in place to create overviews and refreshers. I think it would be very useful to send surveys or quizzes every month to our volunteers for new ideas in wish granting but also refreshers on rules and regulations for volunteering.

