



# **DRAFT\*** L'ARCHE USA BUSINESS PLAN 2017-2020

*This document will exist in three versions:  
2017-2020 Strategic and Operations Plan  
Investor-Ready 10-pager  
One-page engagement tool*

\* The plan will be proof-read and edited and then be discussed and approved by the Board of Directors at the December 2016 Board meeting.

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**This plan is a living document and will be adjusted to the realities of the coming years whenever appropriate and necessary.**

**While it focuses on the current 2015-2020 L'Arche USA Mandate, most of the programs and projects are to be considered as ongoing or mid-term / long-term initiatives.**

**In 2020, the end-of Mandate assessment of this plan and subsequent discernment will establish continuing and new priorities for L'Arche USA's 2020-2025 Mandate.**

# EXECUTIVE SUMMARY

**WHY - The problem:** American citizens with intellectual disabilities are among the most vulnerable in our country. The majority experience social isolation and ongoing humiliation. The negative representation of their lives continues in many ways even today. More concretely, close to 317,000 individuals with intellectual and developmental disabilities are on waiting lists for home and community-based services in the United States. More than 50,000 people with intellectual disabilities live in state-operated institutions or nursing homes.

**HOW - L'Arche's approach:** L'Arche, French for the ark, is committed to changing the way people with intellectual disabilities are seen, from objects of pity to fellow citizens who have intrinsic value and unique contributions to make to others and to society. Both service provider and community of faith, L'Arche provides residential homes, work and therapeutic day programs. L'Arche creates networks of friendship and support and knows that people with intellectual disabilities contribute meaningfully to the growth of compassionate love in others. L'Arche USA is part of a global movement of more than 140 communities in more than 30 countries. In the U.S., there are 17 communities and a number of emerging communities.

**Impact:** L'Arche makes a distinct impact on 1) people with intellectual disabilities and their families, 2) young adults and second-career professionals, 3) the wider society, particularly faith communities / faith-based organizations and the disability service sector.

**WHAT - Member Services:** for communities in the U.S. to remain financially and structurally viable, to expand to reach more individuals in need and be a more visible model of what could be, as well as the faithfulness to L'Arche's mission and core values. **Human Resources and Servant Leadership Development:** professional, personal and spiritual development programs for all individual members of the communities in the U.S., with and without a disability. **Philanthropy:** support to grow local development operations as well as funding for L'Arche International and financial aid to communities in the global South. **Public Relations and Education:** to increase L'Arche's visibility and impact

## 2015-2020 Strategies

### Deepen

Inclusion  
Spirituality  
Diversity  
Member Relationships

### Sustain

Funding  
Leadership  
Federation

### Innovate

Growth  
Marketing  
PR and public education  
Measurement and assessment

**WHO** – The growing team behind L'Arche USA consists of a dozen people, who are committed to serving L'Arche's mission effectively and collegially in a virtual office, with L'Arche USA's headquarters being in Portland, OR. The Board of Directors gathers more than 10 officers with expertise in the disability sector, finances, entrepreneurship, theology, marketing and philanthropy.

**COSTS** – The financial forecast foresees budgets from \$1.3 million in 2017 to \$1.8 million in 2020. The biggest items are L'Arche USA's support to communities in the US through its Regions as well as support of communities in the global South. The capacity of the Office of Development and Communications will be built up gradually over the coming years in order to ensure the sustainability of this plan.

**FUNDING NEEDS** – L'Arche USA seeks to raise \$4.2 million in the next four years. This excludes additional reserve/endowment funds that will be dedicated to emerging and existing communities in the United States in need of temporary financial assistance, as well as to support to communities in the global South.

# I. THE L'ARCHE APPROACH

## I. Problem and solution

American citizens with intellectual disabilities are among the most vulnerable in our country. According to a U.S. Senate report<sup>1</sup>, people with disabilities are more likely to be poor than any other demographic in the nation. The majority experience social isolation and ongoing humiliation. The negative representation of their lives continues in many ways even today. More concretely, close to 317,000 individuals with intellectual and developmental disabilities are on waiting lists for home and community-based services in the United States.

L'Arche, French for the ark, is committed to changing the way people with intellectual disabilities are seen, from objects of pity to fellow citizens who have intrinsic value and unique contributions to make to others and to society. Both service provider and community of faith, L'Arche provides residential homes, work and therapeutic day programs. L'Arche creates networks of friendship and support and knows that people with intellectual disabilities contribute meaningfully to the growth of compassionate love in others.

L'Arche USA is part of a global movement of more than 140 communities in more than 30 countries. In the U.S., there are 17 communities and a number of emerging communities. L'Arche USA receives multiple calls each week from people across the U.S. asking how they can bring L'Arche homes and programs to their local area. We also stand in solidarity with other L'Arche communities around the world.

## 2. Distinctiveness

L'Arche offers a unique approach within the disability sector. People with an intellectual disability deserve and need professional care and support as well as the power to determine their own lives. L'Arche also understands that every human being wants to be seen and treated as a person and be surrounded by love and friendship, no matter what our status. L'Arche is a model of how to do this with each other, rather than for one another.

The impact of L'Arche goes beyond its commitment to people with intellectual disabilities. L'Arche is a school of life for thousands of young "assistants" (care-givers) who live in community for a period of their life. L'Arche models inclusion in neighborhoods, faith communities and the larger community. The L'Arche approach is impacting the way that both secular and faith-based organizations think about how they deliver their services within the public health system. Through public relations and education programs, L'Arche is an authentic messenger of the values of compassionate love, competence and solidarity.

More than 50 years of L'Arche experience have shown that professional care and friendship can go hand in hand. Ultimately, L'Arche is a powerful vehicle for unity in our world, the reason for which Jean Vanier, our founder, was awarded the Templeton Prize in 2015.

## 3. 2015-2020 Mandate and Strategic Projects

The current L'Arche USA Mandate<sup>2</sup> connects L'Arche's focus in the United States with the International Federation of L'Arche Communities<sup>3</sup> (Federation). This Mandate has been translated into 11 Strategic Projects, which stipulate the following priorities:

### **DEEPEN**

Inclusion  
Spirituality

### **SUSTAIN**

Funding plan  
Leadership

### **INNOVATE**

Growth  
Marketing

<sup>1</sup> Fulfilling the Promise: Overcoming Persistent Barriers to Economic Self-Sufficiency for People with Disabilities, Majority Committee Staff Report, September 18, 2014

<sup>2</sup> The Communities of L'Arche in the U.S. discern and redefine L'Arche USA's overarching goals every five years in a Mandate. The Executive Director and Deputy Director serve the organization for a maximum of two mandates. Based on this Mandate, the organization develops its strategies. See 2015-2020 Mandate and Strategic Plan

<sup>3</sup> Through L'Arche USA, L'Arche Communities in the U.S. are members of the Federation.

The following lays out how L'Arche USA intends to complete the current mandate in 2020 and thus build a sustainable L'Arche USA in service of L'Arche's mission.

## II. L'ARCHE USA SERVICES AND PROGRAMS

### I. Membership Services

#### I. The Spirit of L'Arche in the U.S.

**Goal:** The purpose of L'Arche USA is to ensure the alignment of U.S. communities with the global vision, mission and identity of the Federation as well as with our specific national context. As such, L'Arche USA acts as a clearing-house and think-tank for U.S. communities, guided by the Federation's Charter, Identity & Mission as well as the principles of servant leadership, partnership, subsidiarity, accountability, participation, inculturation, solidarity and stewardship, as described in the L'Arche USA Constitution<sup>4</sup>.

**Projects and programs<sup>5</sup>:**

- *Inclusion:* Engagement in the practice and establishment of a culture of inclusive discussion- and decision-making processes
- *Spirituality:* National reflection to establish a theological/anthropological framework of how the spirituality in L'Arche in the U.S. is experienced, understood and how L'Arche ought to position itself in marketing and public relations
- *Diversity:* National reflection and consultation process to deepen our understanding of the place of racial and ethnic diversity<sup>6</sup> in the U.S. and in L'Arche
- Ad-hoc projects on specific and emerging issues

**Audience:** all individual members of L'Arche in the U.S.

**Resources - people:** internal resources of national leadership and local leadership, in liaison with L'Arche International; external assistance of consultants

**Resources – financial:** costs of consultant honorarium, travel, room and board for meetings as well as production of materials.

**Timeframe:** The topic of Inclusion will be worked on throughout the mandate; the spirituality process comprises academic research and a survey of local communities in 2016 as well as two in-person workshops/retreats in 2017 for community leaders (March) and local Board members (November). Diversity will be the focus in 2018-2019.

#### 2. Management and Governance of L'Arche USA

**Goal:** L'Arche USA is a 501(c)3, incorporated in the state of Washington. It is governed by a Board of Directors and employs about 10 staff members, including a Director and Deputy-Director. L'Arche USA strives to ensure high quality services and programs with a slim and effective internal services structure.

**Projects and programs:**

- Capacity-building, as described in 2015-2020 Mandate and Strategic Projects, through additional resources and the optimization of operational effectiveness: strategy, management, internal communication
- Adjustment of structures: development of a membership agreement, revision of the L'Arche USA Constitution, articulation of policies, procedures and protocols (see Governance section below)

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<sup>4</sup> Charter, Identity and Mission Statements and Constitution are available on [www.larcheusa.org](http://www.larcheusa.org) and [www.larche.org](http://www.larche.org)

<sup>5</sup> Project descriptions for each element are available in the appendix of this document

<sup>6</sup> Our religious and spiritual diversity will be addressed by the Spirituality project

- Impact: Development of indicators to measure L'Arche's distinctiveness and impact on 1) people with intellectual disabilities, 2) young adults without a disability and second career assistants<sup>7</sup>, and 3) the wider society. (see Measures and Assessment for details)
- Ongoing administration, financial and HR management, membership rights and responsibilities (fees, intellectual property rights, ...)
- National Events: Members of L'Arche in the U.S. come together regularly for formal meetings

**Resources - people:** National Leadership, Team and National Board and Committees, Consultants

**Resources – financial:** costs of travel, room and board for meetings; auditor, consultants, payroll, ...

**Timeframe:** capacity-building and impact measurement are ongoing; new and revised legal documents will be submitted to National Assembly 2018 for a vote;

**Flow of national events:** National Team and Board meet twice a year; National Assemblies (Community Leaders, Local Boards, Core members, National Board and Team) meet every other year early summer, the Extended Leadership Team of L'Arche USA (National Team and Community Leaders) meets once a year in the spring; local Board members meet every other year in the fall.

### 3. Support of Community resilience, sustainability and growth

**Goal:** One of the primary purposes for L'Arche USA is to support its communities in their effort to engender a vibrant community life and to excel as competent caregivers. While all members of the National Team are at service to local communities, L'Arche USA's Regional Leaders<sup>8</sup> have the specific task to focus on L'Arche's local communities in their respective regions.<sup>9</sup> What makes L'Arche unique is that continuous and long-term relationships are forged between the Federation representative, the Regional Leader, and all members of the local community.

#### Corner-stones of community support

- Community Visits: Regional Leaders are responsible for giving support to L'Arche communities within their Region through community visits and evaluations (see below, Assessment of Community Health).
- Continuous liaison: Regional Leaders are engaged in relationships at every level of the community from Community Leaders to Core Members to Assistants and Board Members. This long-term and in-depth knowledge enables L'Arche USA to receive a continuous glimpse into the life and functioning of the community. It also enables local communities to develop their sense of belonging to the global L'Arche family, its vision, values and mission.
- Unity and organizational know-how: The Regional Leader takes part in celebrations and passages, challenges and opportunities, problems and solutions that a community lives. These experiences are shared and allow for the growth of all communities in the Region, Country and the Federation, as all communities are given access to the wider know-how of the Federation
- Guidelines and policies: Communities comply with a number of regional, national and international guidelines and policies. The Federation representative as a liaison among the different levels, ensures that local communities give input to national or international development and holds communities accountable to the implementation of policies and decisions within a community and Region.
- Shared authority: Community Leader, Regional Leader and Chair of the local Board all carry responsibility for and authority over the local community. The Regional Leader calls this three-some triangle of leadership into regular conference calls. Responsible governance in L'Arche involves boards and leadership at all levels of the Federation working in partnership, dialogue and collaboration. Within this model of partnership and shared authority, Board members, and Regional Leaders have clear and distinctive responsibilities.

<sup>7</sup> Care-givers in L'Arche communities are called assistants.

<sup>8</sup> The Regional Leader is an employee of L'Arche USA and liaises between local programs / communities and L'Arche USA. L'Arche USA represents the authority of the International Federation of L'Arche Communities in the United States. Please see appendix for a glossary of L'Arche terms.

<sup>9</sup> In doing so, they are guided by the Federation's Identity and Mission Statements, L'Arche USA's constitution, and the current Mandate. Going forward, the relationship between local entities and L'Arche USA will be framed by a formal Membership Agreement through which L'Arche USA will exercise its authority that it itself is granted by the Federation.

## 4. Assessment of community health

*The Outside Authority: If a community is to be able to make plans for the future it must have assimilated its past and have a sense of its own traditions. That is one of the reasons the external authority must not change too often, continuity is important. The role of this outside authority is a delicate one. It is to see as clearly as possible the positive forces in the community and also point out the negative ones. The outside authority encourages, helps to renew hope and takes the heat out of things. But it is a passing role. It leaves and the community continues on with the people who are there. Jean Vanier, Community and Growth, p.129*

**Goal:** The planning and the resulting work of a Community's Mandate and Strategic Plan<sup>10</sup> are woven into the day-to-day life of service provision and shared life. This experience is meant to be life-giving and healthy for all members and structures of a Community. How that health is experienced, supported and sustained in a Community is the purpose of a Community Assessment.

This is also the process through which we ensure compliance with quality standards, as well as the community's faithfulness to L'Arche's mission, values and principles.

### **Process:**

#### **Year 1** of Mandate/Strategic Plan:

- Review of the finalization of a Strategic Plan based on the Mandate;
- Self-evaluations coordinated by the Regional Leader / Regional Program Manager: by the Community Leader / Executive Director, by the Community Leadership and Community Council, by the Board Chair
- Feedback conversations facilitated by the Regional Leader and summarized by her/him in a written report

#### **Mid-point** of Mandate/Strategic Plan:

- Comprehensive & Collaborative Community Assessment by the Board Chair, Regional Leader and Community Leader<sup>11</sup>;
- Community Leader Performance Evaluation by a section of the Community and the Board
- Comprehensive Community Evaluation by a section of the Community;
- Board Self-Evaluation;
- Community Sustainability Audit by Board;
- Feedback conversations facilitated by the Regional Leader and summarized by her/him in a written report, on behalf of the Community Leader, Board Chair and the Federation

**Last year** of Mandate / Strategic Plan: complete discernment processes for future Mandate & Community Leader per L'Arche Guidelines

**Audience:** all individuals and Board members of the Community and Regional & National Councils

**Resources:** internal resources of national leadership and local leadership; costs of travel, room and board for meetings as well as production of materials.

**Appendices:** Assessment of Community Health – L'Arche USA Guidelines (2016)

## 5. Communities at Risk or in Crisis

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<sup>10</sup> Similar to L'Arche USA and guided by and seeking the wisdom contained in the Principles of L'Arche, every four to five years, led by the Regional Leader, a Community assesses itself and then calls itself to a vision for the next four to five years. L'Arche communities across the country apply a standard discernment process. That vision is captured in a document called the Mandate. It gives rise to the Community's Strategic Planning process, which determines the specific steps the Community will take to realize the vision of its Mandate. The Mandate is also the benchmark based on which the Community Leader / Executive Director is renewed in her / his role or a new Leader is hired.

<sup>11</sup> L'Arche's governance model is unique in the sense that responsibility for and authority over the different aspects of a local community are shared between the local Board Chair, the local Community Leader / Executive Director and the Federation, which is represented by the Regional Leader / Regional Program Manager.



**Goal:** L'Arche Communities – as any organization and group – live through ups and downs that, if managed well, further growth and maturity. A crisis in a L'Arche Community can take a lot of forms: mission-drift, leadership and / or human resources, financial, competence/adequacy as a service provider and insufficient quality control, public relations and image, unanticipated external factors, etc. L'Arche USA is called to support community and hold them accountable to be faithful to L'Arche's mission, principles and standards of excellence. L'Arche USA's assessment of community life provides the opportunity to proactively identify issues and offer intervention as needed to avoid a potential crisis. Should a crisis occur, L'Arche USA will support the community in managing the crisis. L'Arche USA's formal risk and crisis management protocol will be adopted by the National Board and Member Communities as part of the future Membership Agreement.<sup>12</sup>

**Elements:**

- Define potential crises that would allow the Regional Leader to implement the protocol
- Develop emergency response procedures and contingency processes for each of these crises
- Establish Public Relations guidelines and expectations
- Name positions that must be members of the ad-hoc crisis management team and that will carry the authority and responsibility for the implementation of the protocol
- Ensure the review and endorsement of the protocol by the relevant stakeholders (Team, Board and Member Communities)
- Include an evaluation process that assesses the implementation of the protocol

**Resources - people:** National Leadership, pro bono Consultants, National Board, (Ad hoc) Legal Committee, Member communities

**Resources – financial:** pro bono legal consultants

**Timeframe:** To be developed for approval of draft protocol by National Board in December 2016; then included in process of revision of Constitution and development of Membership Agreement led by Adhoc Legal Committee

## 6. Emerging Communities

**Goal:** L'Arche Communities in the United States are independent legal corporations, licensed service providers in their respective State as well as faith communities that reflect the local environment. Upon completion of the founding process, emerging communities are approved as full members of the Federation. In order to ensure that founding groups lay solid foundations for a sustainable future in service of L'Arche's mission, L'Arche USA requests that each group runs through a pre-defined process. It takes a village to build a L'Arche community. L'Arche USA's role in this process is one of supporter, accompanier and standard-bearer. L'Arche USA is interested in increasing L'Arche's impact through additional communities. A growing and critical mass of communities will have internal benefits, such as economies of scale, a more vibrant regional life for our members, and ultimately more visibility and a higher impact. The demand for new L'Arche communities is high: numerous groups and individuals around the country would like to build or become L'Arche. The current strategic plan calls us to design and implement a strategic growth plan for L'Arche throughout the United States and to optimize L'Arche USA's capacity to help birth these communities.

**Elements to be reviewed:**

- Objective: determine benefits of growth and define areas of growth interest (geographical, social, administrative, innovative and flexible models, ...) to articulate key elements of L'Arche's strategic growth plan in the U.S.
- Adjust structure to support strategic growth and thorough accompaniment: define principles that regulate appropriate investment by L'Arche USA in groups depending on their status and suggest appropriate decision-making process; assess current contact protocol and develop a new protocol that centralizes information in L'Arche USA's database; develop a standardized information package available to staff and members who are likely to be contacted; adjust and/or create role descriptions to integrate these responsibilities
- Improve current founding process to reflect founding groups' needs and realities: revision of International Guide to Growth of New Communities, creation of an info- and toolbox for founding groups that disseminates

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<sup>12</sup> See project of point 2 Management and Governance of L'Arche USA: Adjustment of structures: development of a membership agreement, revision of the L'Arche USA Constitution, articulation of policies, procedures and protocols

best practices, policies and guidelines in the fields of service provision, spirituality, inclusion, leadership, finances, strategy and funding

- Establish parameters of a growth fund and its funding: assess common needs for financial assistance by new communities; develop possible funding scenarios; establish protocols for grants and loans; define mechanisms of accountability, monitoring and reporting; develop a funding plan

**Resources - people:** Growth team, National Team, Local community leaders,

**Resources - financial:** TBD based on recommendations of Task Force

**Timeframe:** Recommendations of the Task Force are expected November 2016. Implementation plan will then be designed.

## 2. Office of Human Resources and Servant Leadership Development

L'Arche frames its Human Resources management in servant leadership and vocational terms. Everyone in L'Arche is called to servant leadership. This is because everyone is called to use their gifts serve L'Arche's mission; everyone - those with and without intellectual disabilities - is called to both receive and give care to each other and invited to be strengthened by the paradox of mutuality. Servant leaders are encouraged to develop professionally, spiritually and personally; they are called to embrace their gifts and offer them in the service of the community and federation. This complements our organizational goals of providing competent and professional services in the context of a faith community. In particular, L'Arche is focused on developing leaders through intentionality in how we announce and invite, prepare and sustain people for leadership and encourage life-long, relational engagement amid role, membership and personal transitions. Those called to particular leadership roles are asked to hone listening, vision and discernment skills to be able to both hear the voice of the larger collective and make timely, courageous, prayerful and creative decisions that further the mission.

### 1. Recruitment

**Goal:** Provide national support and coordination to effectively announce opportunities to join L'Arche; recruit qualified and diverse candidates for community assistant roles and for local, national and international leadership roles.

**Elements:**

- Coordination of national recruitment at identified key colleges (those with potential to benefit from national focus) with in-person representation from communities and alumni
- Coordination of national recruitment with groups identified to diversify candidate pool (e.g. graduate programs, post-grad volunteer programs, faith groups).
- Pilot employment of short-term recruiter for fall season of campus recruitment.
- Managing assistant applicants and referral process for international volunteer programs
- Managing L'Arche USA live-in assistant candidates for local communities.
- Support recruitment and job posting for local, national and international leadership roles.

**Audience:** We are announcing L'Arche to external audiences with potential to join L'Arche in a variety of roles. Audience for leadership roles also includes current and past members.

**Resources:** Internal: Communications expertise and tools, engagement of local communities, including core members, at events. External: alumni engagement, invitation from campuses and other groups for L'Arche recruiting presence. Funding: costs of short-term recruiter and travel costs to in-person events by national and local representatives.

**Timeframe:** Elements for assistant recruitment are in place but will be strengthened in 2017. Recruiting for diverse assistants in 2017, employing short-term recruiter in 2018;

## 2. Professional Development: Formation and Training

**Goal:** In order to prepare and sustain those who carry out our mission, offer a comprehensive range of in-person and online trainings, cohort groups and other resources related to roles, identity and mission and servant leadership. Particular attention on leadership development to address needs of new communities and turnover of experienced leaders.

**Elements:**

- Cohesive regional and national training (online, in-person, cohorts, mentoring) for leaders of varied levels of experience and types of membership
- L'Arche formation for new leaders who are also new to L'Arche
- Local Boards Quarterly Engagement - online formation for cohort support
- Grow national expertise in inclusion through use of external consultants, building up to a part-time role on national team.
- Inclusion training for leaders, including core member training and engagement (core member council) at national assemblies 2018, 2019
- Annual Extended Leadership meeting for community leaders and national team

**Audience:** Most elements are intended for leaders, core members and Board members; national team also helps communities identify strong local training practices.

**Resources:** Internal: trainings and mentoring initiatives require time and expertise from local, national and international leaders. External: our leaders need further inclusion training; expertise in targeted aspects of leadership. Funding: resources to support leadership and inclusion training.

**Timeframe:** In 2017, we will begin national leadership training, inclusion training and Local Board Quarterly Engagement project. By end of 2018, we'll bring cohesion to existing regional and national trainings and frame national inclusion formation.

### **3. Spiritual and Personal Development: Retreats, Reflection, and Accompaniment**

**Goal:** The Goal for L'Arche USA is to enact L'Arche's best practices in support all of its members, with and without a disability, in the living out of their particular role or status in L'Arche. More specifically, the objective is to support holistic, relational development of individuals and communities in the spiritual and personal dimensions through spiritual retreats and resources and through training for mentors/accompaniers; special attention to key elements of L'Arche spirituality, inclusion of core members and of people from diverse faith traditions and no faith tradition.

**Elements**

*Spiritual*

- Cohesive national annual menu of retreat offerings for newer members, longer-term members, community leaders, Board and core members; pilot inclusion of core members on planning teams
- Annual retreat for core members across regions
- Coordinated communication and promotion of international retreats
- Pilot immersion retreat for leaders new to L'Arche
- Pilot L'Arche reflections and formations to be offered externally (campuses and churches)

*Personal*

- Training and resources to further develop personal accompaniers<sup>13</sup> for assistants and core members
- Pilot inclusion of core members in team accompanying new members, leaders, and Board.
- Mentoring and cohort supports (see professional development for leaders)
- External training in leadership discernment accompaniment for national leader(s)

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<sup>13</sup> **Accompaniment of an Assistant:** Is a gratuitous relationship between the assistant and the accompanier. The accompanier, through experience and friendship, supports the assistant to live in community. The accompanier offers his/her wisdom, skills, support and care to be at the service of the assistant desiring to live in community.

**Core Member and Assistant Accompaniment:** Accompaniment of core members is the very foundation of L'Arche. Some core members experience the prison of a broken self-image, which can lead to the inability of self-acceptance. In the "walking with" in mutual relationship trust, patience and acceptance occurs which allows for the Core Member to grow and take a real place in the community as an equal.

**Audience:** Retreats intended for all members, each with its own focus (core members, new and long-term members); external retreats offerings intend to share L'Arche to broader audiences; training for accompaniment is offered first to leaders to benefit all.

**Resources:** Internal: Local and national leaders for retreat teams, accompaniment, local community engagement in external formations. External: alumni engagement, leadership accompaniment training expertise. Funding: funds for leadership accompaniment training, possibly contracting with former L'Arche leaders to support formation/retreat offerings.

**Timeframe:** Cohesive annual retreat offerings and communication of international offerings underway for 2017. Pilot immersion retreat, accompaniment resources in 2018, leadership accompaniment training for national leaders in 2018; external formations in 2019.

#### 4. Alumni Relations

**Goal:** Build up national alumni community that allows for consistent communication and effective outreach to meet alumni needs and to strengthen alumni support of L'Arche initiatives at the local and national and international level in the realms of event support, mentoring, Board membership, recruitment, philanthropy, advocacy, etc.

**Elements:**

- National database of alumni that details past L'Arche experience, skills, education and potential L'Arche engagement, including research with local communities to build base.
- Targeted national social media outreach to alumni with news and opportunities
- Support local communities in hosting annual event with alumni focus and core member engagement
- L'Arche USA alumni engagement outreach with individuals departing local communities
- In consult with local communities, seek support from alumni for national and federation efforts (recruitment, training and formation, philanthropic, advocacy, etc.)
- Conduct alumni survey covering impact of experience and interest in on-going engagement

**Audience:** Alumni from US communities and international alumni now residing in US

**Resources:** Internal: local community collaboration in alumni data and support of national engagement. External: research to build up database. Funding: cost of research and data import, survey.

**Timeframe:** Establish alum database, national outreach to exiting local members and social media engagement in 2017; encourage local alumni events in 2019; seeking support and alumni survey in 2019.

#### 5. Strengthening Human Resource and Leadership Development Practices

**Goal:** We recognize that L'Arche's strengths of transformative relationships, compelling mission and development of member gifts and skills translate into effective practices to recruit, sustain and transition members and employees. We will implement such practices with national team and support communities in strengthening their own practices.

**Elements:**

- Encouragement of individualized annual plan for professional development and formation for leaders in all roles, including Community Leaders and leaders on National Team.
- Resources to support leadership successions with care for organization, community and individuals
- Framework to acknowledge and address membership, belonging and employment as separate, related considerations during transitions
- Intentional invitation in internal posting of local, national and international leadership job openings and national collaboration opportunities.
- Strengthening of other HR practices (performance evaluations, inviting innovation and increased leadership, role flexibility and sustainability, team collaboration and communication) for retention and leadership development.

**Audience:** Recruitment audience is both internal and external to suitable focused audiences including alumni; other practices are aimed at current members and employees.

**Resources:** Internal: collaborative work with local communities, effective communication tools for sharing learnings. External: HR research and consult with similar organizations.

**Timeframe:** Practices will be implemented national and suggested to local communities over time as opportunities arise.

### 3. Office of Advancement

Rooted in the foundational principles of L'Arche, the national Office of Advancement builds the prophetic vision of L'Arche through engagement and connection of people, gifts and resources. This office nurtures the people and mission of L'Arche in the following areas, transforming the lives of individuals, families, communities, our wider society and world.

#### 1. Marketing

**Goal:** L'Arche's marketing is not brand-, but mission-focused. Guided by the belief that every life has equal value, L'Arche is committed to changing the way people with disabilities are seen. L'Arche exists to eradicate the humiliation and marginalization of people with intellectual disabilities. Honoring and welcoming people with an intellectual disability is an act of empowerment and of justice. In the 50 years of L'Arche, people with disabilities have contributed demonstratively to the growth of compassionate love in others. We have learned the value of their contribution and thus seek to assist them to claim their voice. L'Arche's branding is developed and used in support of this theory of change. L'Arche in the United States seeks to present a unified image of its brand to the U.S. society. L'Arche USA is the entity that ensures coherence, relevance and suitability.

**Elements:**

- Branding: ensures community compliance with L'Arche USA style guide and offers design assistance of logos to communities, if desired
- Messaging: takes the lead in finalizing a brand house for L'Arche in the USA, articulating nationally valid and appropriate talking points, ensuring flexibility for local specificities, based on the above theory of change
- Liaison with L'Arche International's communications department

**Resources:** internal resources of Communications Manager; external assistance of consultants, designers and other professionals; costs of honoraria, production of materials.

**Timeline:** styleguide adopted summer 2016; branding house developed fall 2016; national marketing / communications capacity built up starting mid-2017

#### 2. Public Relations and Education

**Goal:** Globally, L'Arche is moving into the post-founder era, which poses unique challenges and opportunities for L'Arche in the area of messaging and dissemination. Jean Vanier has been a charismatic and effective messenger and marketer. In the U.S., Henri Nouwen's legacy still acts as a catalyst for L'Arche. 50 years into L'Arche's story, we are called to develop and operationalize additional means to reach the general public with our core message.

**Process and Elements:**

- Planning phase: L'Arche USA is currently in conversation with different consultancies about a pro-bono engagement that would help us develop a targeted and applicable public relations plan for the coming years, based on our core values and the daily experience of relationships across difference. The planning phase should be finalized by mid-2017.
- Target audience: this PR plan will target specific audiences (local community engagement, young adults, congregations and faith communities, actors within the disability sector, policy makers and philanthropists, etc.)

- Channels: based on our structure, current brand recognition and visibility as well as the aforementioned target audiences, the plan is to describe best ways to disseminate our message
- Contents: the implementation of the plan will require the development of a multi-year messaging plan, and then the selection and production of contents
- Structure: the plan will list the necessary skills and recommend how to employ these in future positions (both staff and contractors) on a national level, with recommendations for L'Arche Communities locally
- Assessment and measurement: the plan is to develop indicators that allow us to measure and describe success and impact

**Resources** - during planning phase: national team; consultants, member communities

**Resources** – during implementation: designers, copy-writers, and other professionals, production of materials, placement fees, etc.

**Timeline:** 2017: planning; 2018 and beyond: implementation

### 3. Public Policy

**Goal:** L'Arche communities in the U.S. are 501(c)(3)s and licensed service providers for people with intellectual disabilities. As such, we are affected by wage and hour, provider and other federal regulations. As an organization that pursues inclusion, we are also interested in the advocacy movement that improves the lives of people who live with intellectual disabilities. On behalf of its member communities, L'Arche USA is called to develop its understanding and skills in the area of public policy.

**Process and Elements:**

- Identify and engage volunteers who are interested to act as L'Arche's watchdog on federal policy developments so as to alert member communities with news and recommendations
- Engage in partnerships with other organizations and movements to contribute to a joint cause and learn from them
- Establish relationships with policy-makers who are active in the field of disability
- Teach local communities how to engage their state and local elected officials
- Assess these first steps and develop future measures

**Resources:** travel, room and board

**Timeline:** 2017

### 4. Building of local fundraising capacity

**Goal:** L'Arche USA provides opportunities for learning, sharing of current best practices and resources, peer support and coordination of fundraising activities between multiple L'Arche entities. In addition, L'Arche USA will provide a new opt-in service of direct consultation to build local fundraising capacity.

**Projects and programs:**

**Ongoing:**

- Formation and training for leaders, staff, and Board members, including a biennial L'Arche USA – L'Arche Canada fundraising workshop
- Fundraising program models and resources for local communities
- Peer support for development staff through bi-monthly conference calls

**Opt-in Service:**

L'Arche USA will hire a Development Coordinator to serve communities on an opt-in basis. This professional, with a proven record of fundraising success, will provide direct consultation services for establishing, maintaining, and/or growing a L'Arche community's fundraising program. This service provides technical know-how, step-by-step advisory support, check-ins and accountability over an 18-month period. The services will be individualized for each community and its specific situation and needs.

**Resources:** National staff, consultants, international staff, community development staff, and the hire of a Development Coordinator.

**Timeline:** Ongoing elements continue as is. Fundraising material templates developed by the end of 2017 based on new style guide and established messaging. Opt-in Service developed in 2017 and launched in 2018.

## 5. Coordination of Collaborative Fundraising Practices and Agreement

**Goal:** Fundraising is a dynamic and integrated component of the mission of L'Arche USA and its member communities, and a key element of our community and organizational life. Local, regional, national, and international L'Arche entities share responsibility and collaborate effectively to achieve our fundraising goals. Success ultimately looks like: a diverse and sustainable base of engaged donors across the United States, win win outcomes for all L'Arche entities, a growing positive impact on U.S. society, and more opportunities for people with disabilities to contribute in a meaningful way to building a better, more human society.

### Process and Elements:

Collaborative funding is grounded in intentional solidarity and partnership between L'Arche entities on the local, national, and international levels. It assumes:

- L'Arche USA and L'Arche International will outline future budgets, including fees and financial aid funding that will be agreed upon ahead of time by member organizations
- L'Arche USA and each of its local communities will make its own concrete annual commitment to L'Arche International's Financial Aid Program, funding L'Arche in the developing world

Collaborative funding is exercised in alignment with the policies, principles and practices outlined in the Collaborative Fundraising Agreement for L'Arche USA and its Member Communities, including:

- When researching and developing relationships for one entity, L'Arche members will look out for and share opportunities that would benefit other entities, such as possibilities for collaboration.
- If there is a known pre-existing relationship between a prospective or current donor, and a L'Arche entity, that relationship will be respected and that donor will not be approached by any other L'Arche entity without the agreement or participation of the entity which enjoys or has cultivated that relationship.
- It is the mandate of L'Arche USA to engage institutional donors with a national scope. Institutional donors with a national scope will be approached by the most appropriate L'Arche entity as determined by consultation between leadership in the locale where that office is located and L'Arche USA.
- It is the responsibility of L'Arche USA to compile fundraising information for all L'Arche entities on an annual basis. Collective statistics will be available to members of L'Arche USA.
- Donors are free to direct where their gifts are to be applied and such requests will be respected. When a donor expresses a desire to deal with another L'Arche entity, such desire will be respected.

Intentional, regular, and open communication, with the initial assumption of good will, is vital to the success of collaborative funding

**Resources:** National staff and Board, community members (including community leaders, development staff, and Board presidents for processing period).

**Timeline:** Collaborative Fundraising Agreement processed with communities and edited as needed in summer and fall 2016 with a vote for approval as an addendum of the future L'Arche USA Membership Agreement.

## III. FINANCIAL FORECAST

### I. Overview and Assumptions

- Compensation/Benefits: Please see section V of business plan for staffing projections through 2020

- International Contributions follow the expectations laid out in the most recent forecast. Financial Aid for L'Arche communities in the developing world remains constant.
- Yearly investment by L'Arche USA of \$17,000 into the Leadership Development program. Final decision made in October 2016.
- Significant investments in professional expertise/consulting in the following areas:
  - Development** (Donor Database, Wealth Screening, Address Acquisition)
  - Communications** (Website upgrade, Communications consultant)
  - Vocational Development** (Leadership Training, Inclusion, Alumni Database Support, Temporary Recruiter, Leadership accompaniment)
  - Administration** (IT upgrade and potential office move)
  - Other** (Spirituality, Diversity, Impact Surveys)
- L'Arche USA will continue to fund the participation of members of inclusion workgroups who are to attend national meetings
- Travel & Meetings: Additional travel and meeting costs for the 2017 IGA in Belfast, as well as incrementally increasing costs for development staff
- Community fees increase incrementally each year until reaching the full program and services amount of \$617,297 in 2021. The schedule for increases can be found in the Membership Fees section of the business plan

### Financial Impact of New Communities

L'Arche USA encourages the growth of new communities and also recognizes that they can occupy a significant amount of time and energy from their Regional Leader and other L'Arche USA supports. New emerging communities will contribute to L'Arche USA in the following ways:

- Reimbursement of all travel expenses for in-person Regional Leader visits
- Upon formally being recognized as a project by L'Arche USA, the new community will begin to make payments to L'Arche USA in recognition of services provided. Obtaining a nonprofit tax exemption from the IRS will be a prerequisite to reaching the project stage. The amount due will be a flat rate of **\$3,000** per year and can be prorated if the community reaches project status in the middle of a calendar year. Monthly payments will be expected as soon as the agreement is signed
- Projects will continue to pay the yearly flat rate amount of \$3,000 until they welcome their first core member and become an operational community. Once this occurs, they will be subject to membership fees the next time fees are recalculated and will continue to pay the flat rate amount up until that point
- Projects that are subject to membership fees will first begin by paying the base fee. Once the project has completed a full fiscal year they will be requested to complete an audit and submit the audited financial statements to L'Arche USA. These statements will be used determine their fees during the next recalculation, which will include all components of the fee formula.

### Impact of Projected Contributions to L'Arche International

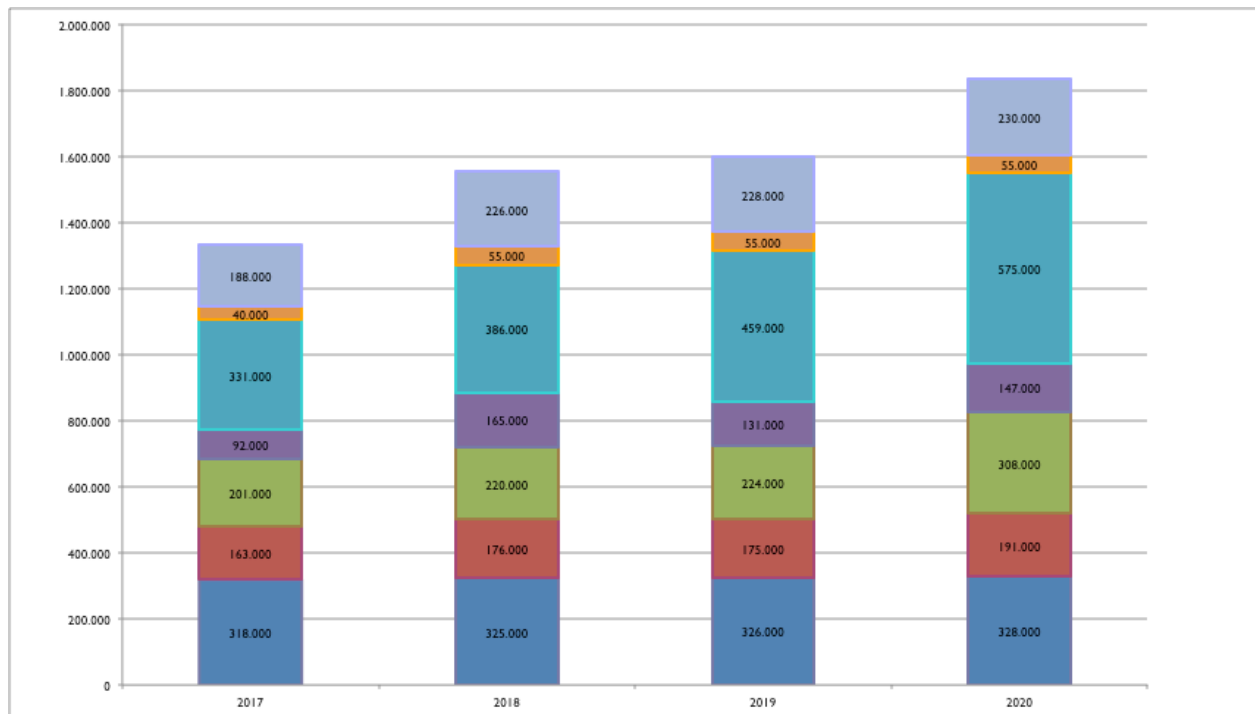
The impact of L'Arche USA's responsibility as one of the main funding sources for the Federation on L'Arche USA's financials, fundraising infrastructure and self-understanding will continue to be discussed with the representatives of L'Arche International and the International Foundation of L'Arche Communities. We will seek the assistance of an expert consultant to develop appropriate structures, targets and cases of support. (Also see Reserves and Endowment in the below Funding Plan)

## 2. Financial forecast 2017-2020

	2017	2018	2019	2020
<b>Regions</b>	318.000	325.000	326.000	328.000
<b>Vocational Development</b>	163.000	176.000	175.000	191.000
<b>Development</b>	201.000	220.000	224.000	308.000
<b>Communications</b>	92.000	165.000	131.000	147.000



<b>International Fees/Support/Financial Aid</b>	331.000	386.000	459.000	575.000
<b>Events</b>	40.000	55.000	55.000	55.000
<b>Administration</b>	188.000	226.000	228.000	230.000
	1.333.000	1.553.000	1.598.000	1.834.000



### 3. Membership Fees

#### Total Fee Amount

As members of L'Arche USA and thus the Federation, L'Arche communities in the United States pay dues. L'Arche USA will phase in an incremental increase in membership fees paid by member communities over the next five years, eventually reaching the amount of \$617,297<sup>14</sup> in 2021. The total fee amount does not fluctuate over the next 5 years. It is tied to the current cost of core services. In 2017, the total fee amount will begin at 60% of the core program and service costs, and increase an additional 10% each year. Below is the fee increase schedule:

Year	2017	2018	2019	2020	2021
% of Total	60%	70%	80%	90%	100%
Total Fee	\$370,378	\$432,108	\$493,838	\$555,567	\$617,297

#### Fee Formula

<sup>14</sup> This amount corresponds to the estimated cost of core programs and services, incl. four Regional Leaders, the National and Vice Leaders, Administration support and the USA Board. It also includes fees paid to L'Arche International (not general support which is considerably higher than fees), and some necessary overhead costs like rent, insurance, and utilities. It does not include communications, fundraising, recruitment, vocational development, financial aid/international contributions, and additional office support.

The formula model features an evenly distributed base fee along with a percent of each community's total revenue. The formula uses the total revenue of a community as a simple and transparent way to assess the community's size and capacity as a member of the Federation. No distinction is made between operating and non-operating income.

- 25%: a base amount equal for each member community
- 75%: amount based on the percentage of the local community's total revenue

### **Process**

L'Arche USA will perform a yearly recalculation of the fees that a community owes.

- Each community will be required to submit an audited financial statement. Each submitted financial statement must successively follow the one used to determine their fees in the prior year.
- The total revenue amount used in the fee formula will be a 3-year average in order to eliminate fluctuations. L'Arche USA will ask for the last 3 years of audited financial statements to complete the calculation of 2017 fees. Each year following there will only be a need to collect the most recent audited statements.
- A few specific and clearly defined forms of revenue will be excluded from a community's total when determining fees. These areas are outlined below.
- Communities with multiple legal entities will be required to submit an audited financial statement for each entity and the revenue from all entities will be included in the total revenue amount used to determine fees

### **Deductions from Total Revenue<sup>15</sup>**

There are a few sources of revenue that can be deducted from the total revenue amount found in a community's audited financial statement. However, these deductions must be documented with L'Arche USA and readily identifiable in your financial statements. Deductions are to help eliminate fluctuations and reduce wide variances of fees from year to year.

At L'Arche USA's discretion, the following sources of revenue may be deducted from the total revenue amount:

- Capital Campaigns: Major capital campaign revenue may be deducted, but the campaign revenue must exceed 10% of the community's total revenue during that fiscal year. The community must also notify L'Arche USA of any campaign before its launch if they want to be considered for a potential deduction.
- Endowments: The first \$20,000 of endowment income will be included in a community's total revenue amount. Any endowment income above \$20,000 will be deducted
- Bequests: Bequests totaling over \$20,000
- Revenue transferred between legal entities controlled by the same community

### **Reassessment**

Before the recalculation of fees for the 2021 calendar year, there will be a reassessment of the fee structure, process, and total amount of estimated core services and programs provided by L'Arche USA. The reassessment will help steer the development of the fee structure for the 2021-2025 calendar years.

The calculation of the total fee amount will be reassessed at the beginning of each new Mandate by the L'Arche USA Board of Directors, based on the budget of the last calendar year of the precedent Mandate. For the 2021-2025 Mandate and due to the incremental implementation of the current structure, the total fee amount will be assessed based on the 2021 budget. Annual changes to the total fee amount cannot exceed 5%. Greater changes have to be implemented incrementally throughout the Mandate. This periodical reassessment by L'Arche USA's Board of Directors is limited to the recalculation of core services, as defined above.

Any other modification of the fee structure, process or definition of core services can only be made after a thorough assessment of the current elements and in consultation with member communities.

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<sup>15</sup> The L'Arche USA Finance Committee will reassess the deductions from total revenue at the end of the current mandate cycle in 2020.

## 4. Opt in/Out Services

As the above programs and services are being developed, member communities will have the possibility to choose opt-in services that will be directly payable to L'Arche USA. Two examples can be imagined in the foreseeable future:

A **web-platform** that centralizes the Internet presence of interested communities as well as L'Arche USA's, with the possibility to develop individualized modules catered to the needs of participating communities whilst ensuring economies of scale, unified branding and messaging and user-friendly accessibility.

A **program to build sustainable funding** for a cohort of participating communities, based on a L'Arche appropriate-model, offering a system of processes, templates, coaching and supervision that holds local communities accountable to invest in their sustainability and achieve their goals.

## 5. Reserve Policy

L'Arche USA will create a board-approved operating reserve policy that sets the goals for the reserve and terms and conditions for its use.

### Goals

- Help ensure the long-term financial stability of L'Arche USA and position it to respond to varying economic conditions and changes affecting the organization's financial position
- To enable L'Arche USA to sustain operations through the uncertain nature of the funding cycle
- Promote public and funder confidence in the long-term sustainability of the organization
- Create an internal line of credit to manage cash flow and maintain financial flexibility, allowing L'Arche USA to financially support communities in crisis
- Improve L'Arche USA's ability to budget and forecast international contributions, recognizing L'Arche USA's responsibility as a funding source of the Federation

### Reserve Fund Components

- **A recommended minimum operating reserve ratio:** The ratio will be determined by the L'Arche USA Board of Directors and the amount will be a percent of the annual expense budget
- **A detailed implementation plan to reach the targeted amount of reserves:** The plan will outline how much will be contributed each year, and the potential sources of this revenue
- **Uses:** Rules on how much of the reserves can be accessed and by whom, including when written documentation and board authorization is required.
- **Management:** How the resources will be managed and invested, including the policies and procedures for handling deposits, reconciling statements, and safeguarding access
- **Reserve Shortfalls:** Details the required steps to be taken by the Board if the reserve balance continues to remain below the targeted level, including the potential to require the adoption of a budget that includes a projected surplus sufficient to rebuild the reserves
- **Finance Committee responsibilities:** Will address reporting requirements of the Finance Committee and a commitment to review the policy on a periodic basis

# IV. FUND DEVELOPMENT PLAN

## I. Annual fund development program

L'Arche USA's goals is to build a robust, systematic, and successful annual fund development program that will provide a solid financial foundation of support for L'Arche in the United States. A major goal in 2017-2020 is broadening the base of support for L'Arche USA. L'Arche USA also seeks to move into a leadership role in the Federation in providing financial support for L'Arche in resource-poor nations. Last but not least, L'Arche USA seeks to discern, encourage and implement the adjustments in organizational culture and design, made necessary by our desire to fully integrate philanthropy into our identity, values and mission.

## 2. Fundraising Targets 2017-2020<sup>16</sup>

	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2017-2020</b>
Foundations	250.000	255.000	260.000	265.000	1.030.000
Annual Fund Giving	90.000	110.000	115.000	120.000	435.000
Major Donors (\$10,000+)	320.000	383.000	385.000	386.000	1.474.000
Contribution to International <sup>17</sup>	254.000	308.000	379.000	493.000	1.434.000
<b>Total</b>	<b>914.000</b>	<b>1.056.000</b>	<b>1.139.000</b>	<b>1.264.000</b>	<b>4.373.000</b>

## 3. Endowment and Reserves

L'Arche USA sees its growing financial responsibilities, particularly in support of

- Emerging and existing communities in the United States in need of temporary financial assistance
- L'Arche Communities in the global South and L'Arche International's support structure
- Its own growing operations

The Board of Directors will initiate a conversation about L'Arche USA's endowment and reserve policy, which are to lay out a plan for L'Arche USA to build up the necessary financial bandwidth in support of its mission. This process will involve members of L'Arche International and the International Foundation of L'Arche Communities. An expert consultant will facilitate and steer this process.

## 4. Strategies

Build the culture of fundraising throughout L'Arche in the United States through:

- Fundraising trainings and formations
- Involvement by staff, Board members, assistants, and core members
- Integrating fundraising throughout our mission activities

Grow fundraising infrastructure of L'Arche USA

- Increase staffing levels: adding a Manager of Annual Fund and Stewardship, Communications Manager (.75 FTE), and Development Coordinators for local support in each region (4 roles at .5 FTE each).
- Conduct an assessment and wealth screening of the L'Arche USA database to maximize efficacy
- Build the national board's role in fundraising, designing individualized fundraising participation for each Board member and ensuring 100% unrestricted Board giving

<sup>16</sup> This projection relies on slow but steady growth to sustain the growth of the organization. It excludes additional reserve funds that are yet to be determined.

<sup>17</sup> Contributions to L'Arche International include all Financial Aid contributions from communities. They do not include L'Arche International Membership fees. Funding sources can be individuals and foundations.

#### Foundation Giving

- Solicitation of funding through grant applications, for example, the Stewardship and Templeton Foundations
- Research and relationship-building to expand the base of support from foundations. This includes national membership to the Foundation Directory and FADICA funding guide.
- Coordinated approaches to foundations at the local, national, and international levels. This donor-centric focus builds relationships with foundations and increases the success of grant applications.

#### Annual Fund

- Bi-annual direct mail appeals, coordinated with social media campaigns
- Testing the purchase of mailing lists in 2017, with potential expansion in 2018, to broaden the current donor database.

#### Major Donor Program

- Launch a Giving Society including giving levels and recognition of cumulative giving to honor the contributions of our donors.
- Planned cultivation of individual donors, including identification, qualification, relationship-building, solicitation, and stewardship.

#### Intentional Donor Stewardship includes:

- Prompt acknowledgment
- In-person contact as possible
- Contact through cards, phone, and e-mail
- Providing updates and opportunities for input on current organizational activities

#### International Contributions

- Coordination with local communities and international staff to raise money for L'Arche worldwide. This includes L'Arche USA and local communities making annual Financial Aid commitments and sharing of best practices for fundraising for international causes.
- Joint applications for funding with and for L'Arche International

#### Planned Giving Program to be launched in 2018

#### Special Events

- Events will typically occur in major U.S. cities, in collaboration with L'Arche USA and L'Arche International as appropriate
- Every event will include intentional follow-up with each attendee

#### Measurement of Impact

- Use of measurements to strengthen future funding proposals, demonstrating L'Arche's efficacy and impact. These can also be used by local communities to strengthen their funding proposals and credibility as part of a larger movement.
- Indicators developed will measure L'Arche's distinctiveness and impact on 1) people with intellectual disabilities, 2) young adults without a disability and second career assistants, and 3) the wider society.

#### Marketing and donor communications

- Create a clearly articulated and compelling national case for support and key messages. This will be finalized in the marketing branding house.
- Publish an Annual Report to both recognize current donors and use as a marketing tool

## 5. 2017 Fundraising Calendar

<b>Month</b>	<b>Activities</b>
<b>January</b>	Acknowledgement calls for 2016 end of year donations, conducted by staff and Board members
	2016 tax receipts mailed to donors

	eNewsletter with the focus audiences of annual fund and major donors
	Individual conversations with each national Board member regarding their participation in fundraising in 2017
	Hire of new Manager of Annual Fund and Stewardship with a focus on broadening the annual fund giving base and stewardship of donors
	Development Resource Group Call
<b>February</b>	
<b>March</b>	Spring appeal, accompanied by social media campaign
	L'Arche USA – Canada Fundraising Workshop in Montreal
	eNewsletter sent
	Development Resource Group call
	Hire of a communications consultant to design marketing and communications plan
<b>April</b>	Spring hardcopy newsletter mailed with the focus audiences of annual fund and major donors
<b>May</b>	eNewsletter sent
	Development Resource Group call
	Vote on membership agreement, including Collaborative Fundraising Agreement
<b>June</b>	Hire of new Communications Manager to coordinate internal communication and develop communication with external audiences
<b>July</b>	Annual Report mailed
	eNewsletter sent
	Development Resource Group call
<b>August</b>	
<b>September</b>	Fall hardcopy newsletter mailed with the focus audiences of annual fund and major donors
	eNewsletter sent
	Development Resource Group call
<b>October</b>	
<b>November</b>	End of year appeal, accompanied by social media campaign
	USA Board writes handwritten cards to major donors
	eNewsletter sent
	Development Resource Group call
<b>December</b>	Giving Tuesday appeal through social media
	End of year e-mail appeal

**Ongoing:**

- Gift acknowledgment through letters, cards, and phone calls
- Grant research, applications and reporting
- Impact measurement design and implementation
- Meetings of the national Board development Committee with a focus on identifying and approaches to new prospective donors
- Cultivation of current and prospective donors by staff, Board, and development Committee
- Face-to-face visits with major donors by USA National Leader, staff and Board members
- Development and maintenance of database records
- Coordination of fundraising for L'Arche worldwide with local communities and International
- Regular social media presence with opportunities to give
- Two fundraising events – time and place YTD
- Building of the Giving Society, including a cumulative giving society and establishing donor giving levels for use in communicating appreciation for the support of donors
- Testing of use of acquired mailing lists
- Revise gift acknowledgment and acceptance policies as needed

## V. STAFFING PROJECTIONS

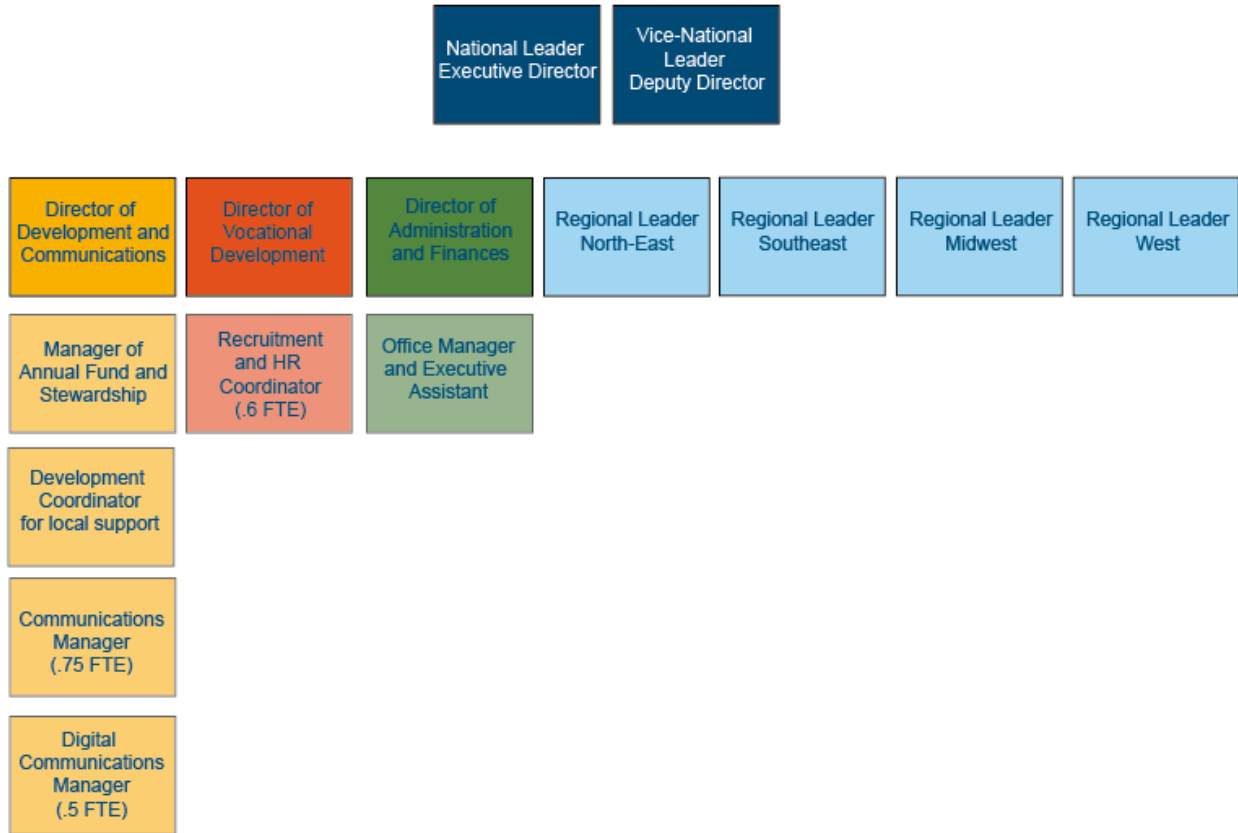
Based on the above programs and projects, the recommendations of the auditor of our Office of Development and Communications and a thorough assessment of needs, the below organizational charts show how L'Arche USA's staffing structure could evolve. The creation of new positions is dependent on funding and the continuous assessment of the development of the organization. The org charts do not show consultants who contribute to our mission on a short-time or hourly basis.

### I. 2017



The Assistant Regional Leader East assists the Regional Leader East in regional matters. However, s/he reports directly to the National Leader for the communities that s/he accompanies and the national projects for which s/he is responsible.

### 2. 2018



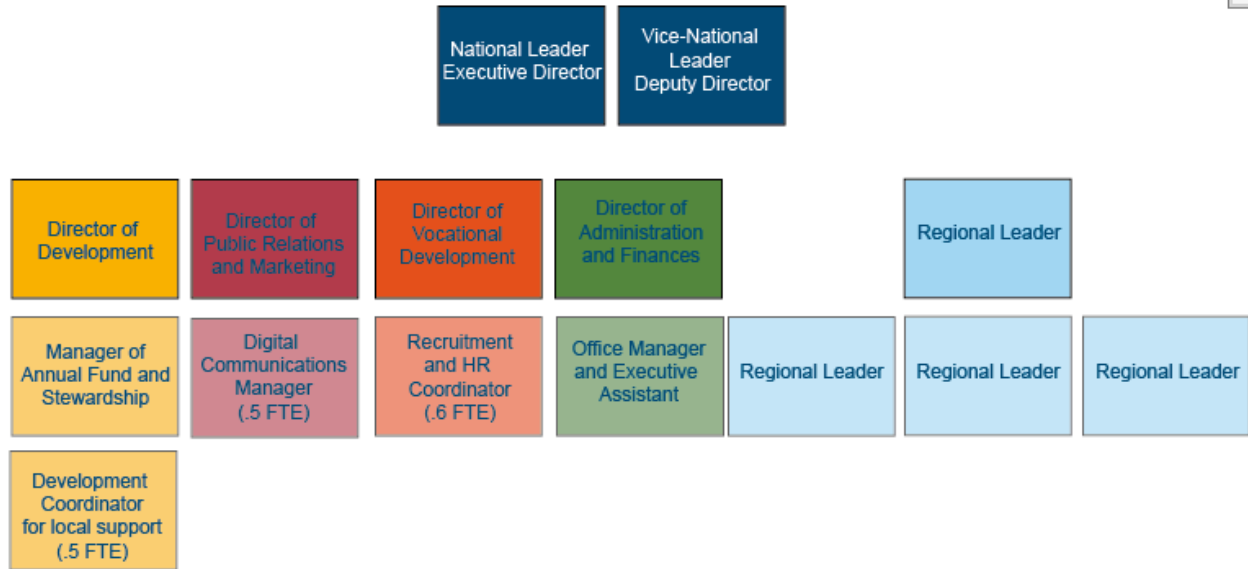
The Development Coordinator for local support and the Communications Manager would be partly funded through direct payments of communities that opt-in those two services.

2018 will see the creation of four Regions and thus the employment of four Regional Leaders.

L’Arche USA will start to centralize its offices of Development and Communications as well as Administration and Finances in Portland, OR. The increased activity at the office will allow us to centralize the need for office and administrative support in one position, the Office Manager and Executive Assistant.

### 3. 2019





Following the advice of the Auditor of our Offices of Development and Communications and in line with our plans to enhance our Public Relations and Education activities, the Office of Development and Communications will be split into two separate functions.

#### 4. 2020



The 2020 Org Chart is to be considered as a thought-starter. It is to be seen whether our needs in the field of public policy and inclusion require the employment of a part-time expert. The idea to dispatch part-time development coordinators to the four regions who would support and oversee the capacity-building efforts of local development operations and build relationships with major donor prospects is innovative. A thorough analysis of this idea will be made in 2018 at the latest.

## **VI. BOARD DEVELOPMENT**

### **1. The Role of the Board of Directors**

L'Arche USA shares the common Mission of L'Arche communities around the world, and as such its Board is responsible for integrating and supporting L'Arche in the United States to that Mission.

The Board has a leadership role in policy formulation, fundraising, communications, Board development, government relations, oversight and other support of regions and communities of L'Arche USA. The Board seeks to enable local communities to flourish and new communities to begin in accordance with the International Charter, Identity and Mission, the International Constitution, and regulations of and agreements with the Federation; as well as the Constitution and policies of L'Arche USA. In carrying out its role in relationship to member communities, the Board adheres to the principle of subsidiarity. (See "The Role of the Board in L'Arche: A Federation Policy" in the Appendix)

### **2. Responsibilities of the Board of Directors**

As the highest leadership body of L'Arche USA and to satisfy its fiduciary duties, the Board is responsible for hiring and evaluating the performance of the National Leader. The Board ensures ongoing strategic and organizational planning, while ensuring strong fiduciary oversight and financial management, including financial policies regarding employee compensation. One of the primary focuses is fundraising and resource development to support L'Arche USA's operations, including its duties to its members and the Federation, as well as establishing appropriate risk-management planning, policies and practices.

The L'Arche USA Board is tasked with approving and monitoring L'Arche USA's programs and services, maintaining regular and transparent communication with L'Arche USA's members and the Federation, and working in solidarity with the larger family of L'Arche in the Federation. It is vigilant in assessing its own performance as the governing body of L'Arche USA and always working to enhance L'Arche USA's public image.

### **3. Composition of the Board of Directors**

The L'Arche USA Board of Directors is composed of individuals from diverse professional and spiritual backgrounds who live in various geographical locations throughout the United States. Many of our Board members have a history of shared life with L'Arche, or live close to, and have a friendship relationship with, a local L'Arche Community. Our bylaws state that the National Board is composed of 6-20 directors. Under the current Constitution, the National Leader, Vice-National Leader and Regional Leaders serve as ex-officio members of the National Board.

### **4. Assessment of the Needs of the Board of Directors**

The Governance Committee of the L'Arche USA Board of Directors is charged with maintaining vigilance and self-awareness on the needs of the Board as a whole. The Governance Committee assures that roster timelines are maintained and is tasked with being sensitive to preserving gender, geographic, professional, racial and other types of diversity amongst the directors serving on the Board. The Governance Committee is always listening, observing and attentive to needs expressed by leadership or implied through priorities and strategic initiatives.

As the needs and priorities of the organization change (as described in Mandate and Strategic Plans), it is the responsibility of the Governance Committee to identify areas of shortcoming on the Board and make suggestions and recruit nominees to address those needs. Periodic group self-assessment sessions also help to identify areas where the Board may need more support.

### **5. Identification of Board members**

Identifying and recruiting new members to the L'Arche USA Board of Directors is an ongoing process. Leaders throughout the National Team and USA Board Members are tasked with remaining attentive to prospective candidates for future Board service in the various and varied encounters related to their work. As specific needs

are identified by the Board, the Governance Committee follows leads and communicates with various networks based on the candidate being sought. The Governance Committee also maintains an ongoing list of potential Board prospects to remain attentive to, perhaps to plant some seeds with and eventually to cultivate. Prospective candidates are vetted by the Governance Committee before the nomination process is launched.

## **6. Cultivation of Prospective Board Members Recruitment of Board members**

As specific needs are clarified and potential candidates identified, the Governance Committee starts the process of vetting candidates. Sometimes a specific candidate comes highly recommended from a very trusted source and the recruitment focuses entirely on cultivating and educating that candidate. At other times, recruitment may require talking to a number of different candidates to narrow down to the one who has the required passion for the mission and ability and willingness to commit the time to execute in the area that is needed.

The recruitment process involves several discussions via phone, email, and if geographically possible, preferably in person. There is a natural progression from initial introductions, to some back and forth with more specific questions and education, to eventually a discernment process in which the Governance Committee asks that the candidate sincerely reflect on his or her ability to commit to the expectations as described in our Board Member Role Description (attached in Appendix). This process may take months or even years depending on the candidate's availability and familiarity with L'Arche. Sometimes the candidate is asked to join a committee of the Board, or assist with an ad hoc project in order to gain some working knowledge of L'Arche and its team members, before being asked to formally consider joining the Board.

Once a candidate has accepted the call to be nominated for Board service, the Governance Committee prepares a summary report detailing the reasons for the candidacy and justifications for why a nomination is in order. The L'Arche USA Board approves the nomination, and the nomination is then sent out to the L'Arche USA National Assembly for a vote of its confirmed members. A simple majority of the votes cast by at least two-thirds of the confirmed members is required to approve the candidate's nomination.

## **7. Orientation and Onboarding**

The orientation and onboarding process of new Board members is tailored to each individual's specific needs and requirements. The L'Arche USA Board of Directors wants all of its members to be deeply committed and rooted in the mission of L'Arche. A new Board member who comes to us with a specific skillset and experience to be of service to L'Arche USA but who does not have past experience with L'Arche will receive a very different orientation than a new director with vast experience in L'Arche.

Each new director is assigned a mentor for the first year – a fellow, more seasoned Board member with whom he or she can dialogue regularly and reach out to for answers to questions. The mentor is charged with being attentive to specific needs and directing the new Board member towards specific resources as necessary.

New directors are also provided with recent and current information regarding the status and functioning of L'Arche USA, and all of the various documents that regulate the governance and assure the faithfulness to the mission of L'Arche USA's Board of Directors. Time is dedicated during Board proceedings to educate new Board members on discussion topics and vital areas of debate and decision-making.

## **8. Training and Education**

The best training and education for L'Arche USA Board Members is experienced by sharing life in our communities. Directors are encouraged to create relationships with local communities and their members, participate in regional and national gatherings and events, and stay tuned into the reality and life of L'Arche around the globe through electronic newsletter subscriptions and reports to the Board. Training is regularly provided on specific subjects during Board meetings. The Board also strives to dedicate part of its in-person year end meeting to Board development, training and assessment.

Suggested participation in training and in reading electronic newsletters on generic governing Boards of non-profits is also encouraged.

## **9. Organization and Functioning of the Board and its Committees**

In-person meetings are the foundation of creating collaboration and building working relationships based on our passion for the mission of L'Arche USA. However, because the members of L'Arche USA Board of Directors are intentionally recruited from throughout the various geographic locations where L'Arche in the US is located, our Board of Directors does much of its work remotely. The Board meets in-person during our National Assembly in the Spring, where we have the advantage of working, celebrating and spending time with members from L'Arche communities throughout the country. The Board meets again, with the National Team, near the end of each calendar year to review year-end financial projections and set goals and priorities for the following year. Outside of these two meetings, the work of the National Board is carried out through committee work, individual and group phone and email conversations, and projects and reports that are discussed and finalized during six to eight conference call meetings scheduled throughout the year.

National Board committees range in size from three to ten members depending on the role of the committee. Each committee is chaired by a member of the National Board and includes among its members individuals who do not serve on the National Board but who bring their specific skillset and experience to the service of the committee. Board committees change based on needs, but in general there are at least the following active committees in ongoing service of the Board: Executive, Finance, Development and Communications, Governance, and Legal<sup>18</sup>. Ad hoc committees are formed and dissolved periodically as needed for specific actions.

## **10. Retention: use of Members' Resources, Engagement of Board, Evaluation**

The focused work required by a committee, and the engagement created by calling an individual to put his or her expertise at the service of the mission of L'Arche in the US is one of our strongest tools for retention. We intentionally seek out Board members who feel a calling to participate in the mission of L'Arche USA and are looking for a commitment where they can put skills learned over decades to work in a productive way to strengthen the organization and build the future. Board members are generally recruited based on specific areas of experience and discussions about committee service generally start very early in the recruiting process.

Mentors and the Governance Committee stay attentive to the well-being of Board members and either a member of the Governance Committee, or the Board Chair, checks in with each Board member annually to listen to concerns and suggestions, as well as to provide feedback. At the end of each director's term, either the Board Chair, or a member of the Governance Committee, has a sincere discussion with that director to assess current levels of commitment and engagement, and to evaluate the director's desire and commitment to serve another term. This is also an opportunity to provide input and suggestions for development and growth as needed.

## **11. Financial contributions**

Based on the recommendations of the Auditor of the Office of Development and Communications, the Governance Committee will develop Board giving guidelines, which will be approved by the Board of Directors at its Fall 2016 meeting.

## **12. Rotation and term-limits**

Terms for directors on the L'Arche USA Board are for four years, with up to two renewals, for a potential maximum total number of twelve years of service. The four year terms with potential for renewal provide stability and continuity on the Board, while the opportunity for assessment and re-evaluation at the end of each term, and the limit of twelve years total, provides for healthy, periodic recommitment of existing members, as well as turnover that allows room to bring new members on Board.

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<sup>18</sup> The standing Legal Committee of the Board will resume / start its activities once the Ad hoc Legal Committee of the National Assembly has completed its tasks.

### 13. Recognition and Celebration

To the extent possible, Board member terms are set for December 31st of the appropriate year. This schedule provides for predictability in anticipating Board needs and turnover. This rhythm also allows for the Board to recognize and celebrate members' service at the end of their terms during its annual year end in-person meeting. Many members serve for a decade or more, and because directors share a passion for the same mission, and often have worked through successes and challenges together, there are real friendships and deep relationships that are prayerfully honored and respectfully celebrated at the end of a member's terms of service.

## VII. GOVERNANCE

L'Arche USA's governance principles, practices and bodies are defined in the L'Arche USA Constitution, which refers to the L'Arche International Constitution. The L'Arche USA Constitution will be revised in the coming years to adjust our structure to today's call and needs. Simultaneously, L'Arche USA will develop a Membership Agreement with related policies, procedures and protocols. This effort will be led by an ad-hoc legal Committee whose members will be nominated by the National Assembly. The new documents will be submitted for an up-down vote to member communities and hopefully come into force in 2018 at the latest.

### 1. Membership

L'Arche communities in the United States are members of the Federation. L'Arche USA carries the authority for membership in the United States and on behalf of the Federation. Every community commits to membership rights and responsibilities, including membership fees, compliance to identity and mission as well as quality service provision, intellectual property and branding / messaging guidelines, as well as other policies, procedures and protocols. All of these will be defined in a Membership Agreement.

### 2. National Team

The National team is led by the National Leader / Executive Director, assisted by the Vice-National Leader / Deputy Director. With the incremental implementation of the aforementioned staffing structure, the leadership of L'Arche USA will be invited to reconsider the constitution of its leadership team, currently the National Council. Different scenarios will be developed and best practices will be gathered from within the Federation and other federated organizations. While a part of the growing team will be based in Portland, L'Arche USA will continue to employ staff across the country. The National Team will develop and commit to a Virtual Office Code of Conduct to ensure that the team works as effectively and collegially as possible.

### 3. Meetings and Assemblies

New strategies, projects and programs require a renewed cooperation with our members, L'Arche International and external partners. Below are the groups that will meet regularly in the coming years.

The **Extended Leadership Team** of L'Arche USA brings together all Community Leaders / Executive Directors of local member communities as well as the National Leadership Team. Other members of the National Team can be invited. It meets at least once per year, in the spring.

The **National Stewardship Group** consists of the National Board and the Board Chairs (or representatives) of local member communities. This group meets every other year in the fall.

**Core Member Council** – members appointed for two years culminating in work within National Assembly. Topics requiring wisdom for the National Team will be submitted to this Council every two months for accompanied review and feedback.

The **National Assembly** takes place at least once during the five-year mandate, possibly every other year. Under the current Constitution, it gathers the National Board and National Leadership Team as ex officio

members, the Chair (or representative) of local Boards, the Community Leader / Executive Director of each member community. Core member representatives are present as guests. Representatives of project communities may also attend as guests without voting rights.

The **Regional Council** consists of the Regional Leader (Assistant Regional Leader if there is one), and community leaders of confirmed and probationary member communities within a region. The Regional Leader chairs the council. Regional Councils meet twice a year in person, with additional meetings, as necessary, by phone or video conference. The Council brings the member communities together, plans regional activities, addresses regional issues, and supports and provides peer supervision to the community leaders.

#### 4. National Board of Directors

The Board of Directors carries the fiduciary and legal responsibility for L’Arche USA. The Board meets twice a year in person and in conference calls, as appropriate. The Board runs a number of working committees (Governance, Finance, Development & Communications, Legal) and may be assisted by an Advisory Group. Members of the National Board are nominated by any member of L’Arche in the United States and then voted by the National Assembly. National Board members may serve on local Boards. Responsibilities, terms and commitments are determined by the Governance Committee and voted by the full Board (see Board Development).

### VIII. Measures and Assessment

#### I. Measurements

L’Arche provides services for people with intellectual disabilities in inclusive communities of faith and friendship where people of all abilities share life together. Thousands of young professionals, families, friends, neighbors and partners experience transformation and become actors of change in our society.

Our Strategic Plan will build capacity in L’Arche USA on three levels through 2020:

- Deepening our foundational cultural practices of Inclusion, Diversity and Spirituality.
- Sustaining ourselves as an organization through Funding Initiatives, Developing our People, Exploring Models of Community and committing to being in Solidarity with the larger body of L’Arche.
- Innovating through the Development of New Communities, creation of a consistent Message and Brand about L’Arche in the U.S., and joining opportunities to Advocate and influence Public Policy.

#### 2. The Big Challenge: Measuring Impact

For any nonprofit, measuring impact is difficult. Many factors influence outputs and outcomes, and for mission-driven organizations, many of those factors are beyond their control. Mission-driven organizations can only work to contribute to results. Yet, L’Arche USA is aware of the enormous potential of L’Arche’s mission and our responsibility to fully articulate L’Arche’s theory of change so as to serve our mission as effectively as possible.

Impact	Cultivate Compassionate Love	
Beneficiaries	<b>Member Communities</b> Parents Siblings Alumni L’Arche leaders	<b>Wider society</b> Faith Communities and faith-based organizations Disability sector Medical Field Higher Education
Outcomes		

Changes, or effects, on individuals or the environment that follow from the delivery of products and services by L'Arche USA	Trust – Mutuality – Forgiveness – Celebration – Vulnerability – Simplicity – Acceptance – Welcome – Belonging – Solidarity – Relationships – Inclusion – Diversity – Leadership – Self Actualization – Esteem – Safety – Physiological well-being <sup>19</sup>		
<b>Outputs</b> Tangible, immediate practices, products and services that result from L'Arche USA's activities.	Sustainable and healthy L'Arche Communities		
	Quality-care provided to people who live with intellectual disabilities		
	Gifts of people with intellectual disabilities are revealed		
	The message of unity, faithfulness and reconciliation is audible and visible		
	<b>Deepen</b>	<b>Sustain</b>	<b>Innovate</b>
<b>Activities</b> Actions, or tasks, that are performed by L'Arche USA in support of specific impact objectives	<b>The Spirit of L'Arche</b> Spirituality Diversity Belonging to Federation	<b>Management and Governance</b>	<b>Philanthropy</b> Sustainable Funding
	<b>Vocational Development</b> Leadership Inclusion	<b>Membership Services</b> Support & assessment of communities New communities	<b>Outreach</b> Public Relations and Education Marketing Public Policy

### An action-oriented mission

Almost all of our work has measures of impact that will take years, but the vision shouldn't be forsaken simply because we can't measure ultimate impact, today. Process measures help us measure the road **toward** impact. By the end of the three-year project, L'Arche USA expects the following outcomes to be achieved:

1. L'Arche USA will enhance and nurture the spirituality and faith-life in its Communities by the end of 2018 and will develop tools to share our experience with faith communities, congregations and churches.
2. L'Arche's call to reflect the ethnic, racial and religious diversity of the country will be understood and concrete measures will be developed.
3. L'Arche USA will have successfully enhanced our members' understanding of the cultural, religious and socio-economic distinctiveness of L'Arche in the United States and will have offered the resulting gifts to the Federation.
4. L'Arche USA will complete business and funding plans in the Fall of 2016 with successful implementation in 2017-18, in order to increase its financial sustainability, accountability and impact of its programs and services. By 2018, L'Arche USA will have revised its Constitution and developed a Membership Agreement with Communities.
5. The development of new leaders for our Communities – both new and those identified as losing an established leader due to retirement or term limit completion.
6. Greater inclusion of individuals with intellectual disabilities in L'Arche leadership roles and responsibilities; particularly, as spokespeople to the wider world and partners in internal discussion- and decision-making processes.
7. The presence of L'Arche in the U.S. will expand through the welcoming of 3 new L'Arche communities by the end of 2019.
8. The recognition of / knowledge of L'Arche in the U.S. will increase through a public relations strategy & marketing plans to be implemented in 2018-20.

<sup>19</sup> Sources: „A Learning Guide for the Spirituality of L'Arche“, L'Arche USA, 2011; 2015-2020 L'Arche USA Mandate; Abraham Maslow „Hierarchy of Needs – A Theory of Human Motivation“, 1943

9. Finally, the organization's metrics will play an important part in engaging donors. By the end of this Mandate / Strategic Plan, L'Arche USA envisions growing from being a \$1.3 million a year operation to a more than \$1.8 million a year one. People should know that if they invest with L'Arche, there are solid processes in place to use their money wisely.

### **Commitment to Accountability and Transparency**

As a faith-based, human service organization with its overarching mission objective – “Cultivate Compassionate Love” – at the top of its scorecard, measures should, eventually, represent the accountability between L'Arche and society. However, such an outlook would show progress with long lags, which is why the measures in the four main perspectives of the Balanced Scorecard – People/Community, Processes, Learning & Growth & Financial Stewardship – will provide the short- to intermediate-term targets and feedback. The Balanced Scorecard will enable L'Arche USA to bridge the gap between its mission and strategy statements and the day-to-day operational actions. It will facilitate a process by which it can achieve strategic focus, avoiding the trap of trying to be everything to everyone. The measurement system shifts our focus from programs and initiatives to the outcomes the programs and initiatives are supposed to accomplish. For any nonprofit, the ultimate measure of success – those topmost strategy map measures – should be about outcomes and impact. But in the early stages, it is often difficult to avoid process measures. L'Arche views process measures as being useful in establishing a measurement system while program teams are accumulating baseline data and initial results.<sup>20</sup> It will enable L'Arche USA to align initiatives, departments, and individuals to work in ways that reinforce each other leading to performance improvements. Used in this way, all organizational resources – the senior leadership team, technology resources, initiatives, change programs, financial resources, and human resources – become aligned to L'Arche USA accomplishing its organizational objectives.

### **Acceptance of the need to revise and improve**

L'Arche's leaders understand that the strategy and performance management system will be a work in progress. Every year, L'Arche will conduct an update, setting new targets, refining measures, and making other needed revisions to improve the process. By using a framework that offers transparency, the leadership team will be able to more effectively dedicate its limited time and attention to focusing the rest of the organization on the key measures and processes that improve results for “imagining the world differently”.

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<sup>20</sup> Sources: Strategic Performance Measurement and Management in Nonprofit Organizations, Robert S. Kaplan, NONPROFIT MANAGEMENT & LEADERSHIP, 11(3), Spring 2001 © Jossey-Bass, A Publishing Unit of John Wiley & Sons, Inc.; Measuring, Managing and Making a Difference at RARE, Clearpoint Strategy, Ascendant Strategy Management Group, 2013.



## **Appendices**

**Appendix A: Overview of the Business and Funding Planning Process**

**Appendix B: Key Informants and Participants**

**Appendix C: 2015-2020 Mandate and Strategic Projects**

**Appendix D: Financial Documents**

**Appendix E: Glossary of L'Arche terms**

**Appendix F: Job Descriptions**

**Appendix G: Draft Collaborative Fundraising Agreement**

**Appendix H: Style Guide**

**Appendix I: Full Project and Program Descriptions**

**Appendix J: Key Implementation Tasks and Timeline**

**Appendix K: List of Official Documents, Policies and Guidelines**

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