Day One: Tuesday, June 25th

7:30 am	Leave Chicago for Wisconsin
11 am	Arrive at JCC Perlstein Resort, Lake Delton
Noon	Lunch
1 – 1:45 pm	Ted Talks Warm-up Exercise
2 pm – 5:30 pm	Work/Implementation Plan
6 pm	Dinner
7:30 pm	Work/Implementation Plan Strengthsfinder Exercise
9:30 pm	Free time/Group Optional Activities

Day Two: Wednesday, June 26th

8:30 am	Breakfast
9:30 am	School Service Agreements Departmental Policies/Procedures
Noon	Lunch
1 pm	Team Building Activity (tbd)

Relationships

- Development and Communications (D&C) Department hold primary relationships with private funders and, as such, should be involved in all interactions.
- Directors/Principals should utilize funders as a resource surrounding program implementation *only* when it makes sense and is a natural option and should utilize D&C staff for strategic guidance.
- D&C should be kept abreast of all funding relationships, public and private, as this will facilitate proposal support.
- D&C should be informed of programmatic partnerships, both funders and non-funders.
- Directors/Principals should *always* notify D&C when there is a site visit, or when a funder will be present at Instituto at least two days prior.
- Directors/Principals should *always* consult D&C and their director/principal when there are funding opportunities/grants that staff/students are researching outside of D&C.
- Directors/Principals should *always* inform and consult D&C concerning volunteer prospects and needs.
- Directors/Principals should inform D&C of auxiliary/departmental fundraisers, providing the amount raised, the means by which it was raised, and, when possible, donor information. Additionally, if these same donors would like to be issued a tax receipt letter, they should be directed to D&C.

IDPL Collaborative Prospecting/Renewal Proposal Process

1. Opportunity Identification (renewal notification, referral, prospecting, etc.)
   a. Send opportunity to D&C, while making Director aware (preferably done via email and cc Director)
2. Qualification
   a. Director in conjunction with D&C and Dr. Estrada will determine if funding opportunity is a good and strategic fit for Instituto
3. Information gathering
   a. Identify and attend information sessions (Directors and D&C Project Lead)
4. Group Meeting organized by D&C Project Lead
   a. Vet and establish application strategy
   b. Divvy workload
   c. Identification of next steps and timeline
   d. Confirmation of Project Leads (Directors and D&C)
5. Follow-up email by D&C Project Lead outlining outcomes and deadlines established in group meeting
6. Creation of proposal template by D&C Project Lead
   a. Email to lead Director(s)
   b. Divvy up tasks within the template between D&C and lead Director(s)
7. D&C finalize application
   a. Send drafts to D&C Director and Dr. Estrada

    b. Make subsequent edits and send for one more read-through, D&C and lead Director
    c. D&C submits application (unless otherwise identified)

IJLA Collaborative Prospecting/Renewal Proposal Process

1. Opportunity Identification (renewal notification, referral, prospecting, etc.)
    a. D&C will prospect and identify opportunities on an ongoing basis
        i. If IJLA staff or students identify opportunities for grant projects, send opportunity to D&C for qualification, while making Principal aware (preferably done via email and cc Principal)
2. Qualification
    a. D&C Manager will share opportunity and recommendations via a one-pager to be shared with Principal, D&C Director, and Dr. Estrada
    b. Principal, D&C Director, and D&C Manager will determine if funding opportunity is a good and strategic fit for IJLA and whether all parties have the capacity to complete the project
    c. Finalize qualification process with Dr. Estrada and/or Juan
3. Information gathering
    a. Identify and attend information sessions if offered by the grantor (Principal or Identified IJLA faculty/staff member and D&C Manager)
4. Group Meeting organized by D&C Manager
    a. Confirmation of project leads (consisting of D&C Manager and IJLA faculty/ staff, as identified by the Principal)
    b. Brainstorm
        i. establish application strategy and share ideas for original writing as needed
    c. Divvy workload
    d. Identification of next steps and timeline
5. Follow-up email by D&C Manager outlining outcomes, deadlines and next steps as established in Group Meeting (Step #4)
6. Creation of proposal template by D&C Manager
    a. Email to all parties
    b. D&C Manager divvies up tasks within the template between D&C and IJLA
7. D&C Finalize Application - Tuning
    a. Send drafts to D&C Director, IJLA Principal for final edits
8. D&C submits application (unless otherwise identified)

IDPL/IJLA/IHSCA Grant Reporting Process

- Once an award is officially granted, meet with Dr. Estrada and the Compliance Team to understand any required reports on impact of funding used, including data required, deadlines for reports, and any subsequent required meetings with funders (if any).
- Collect data as needed for reports and review with Dr. Estrada.
- D&C will provide reminders on pending reports and deadlines.

- As needed, work the D&C will provide project management to compile reports, coordinating meetings with Compliance, Accounting, and other relevant departments, and providing support in writing and editing.
- D&C will coordinate final submission of required reports and required site visits with funders (if any).

Branding and Communications
- All staff members (Instituto), will use the standardized signature design as rolled-out by D&C, which is also posted on the Intranet.
- All departments and schools will cease launching new Facebook pages (if one exists already, it will be required to delete or merge account) and instead work with D&C to create groups as part of the primary Instituto Facebook page.
- All departments and schools will assist D&C to ensure the current website is up-to-date.
- All departments and schools will support D&C in building a new website that will represent all three organizations and, as such, will cease alternative websites or website development.
- All departments and schools will support D&C creating and writing one annual report that will represent all three organizations.
- All departments and schools will use letterhead as rolled-out by D&C, which is also posted on the Intranet.
- All departments and schools are required to gain approval from D&C prior to printing materials and merchandise - and thus must also utilize the department's print request form as posted on the Intranet.
- All departments and schools will cease creating and publicizing media alerts. All media requests are to go through D&C only with at least a week's notice to the event.
- All departments and schools will divert media inquiries of any kind to D&C (this includes newspapers, TV news, radio, bloggers, student journalists, documentary movie makers, or any other individuals seeking to utilize a depiction of Instituto in a public way); staff should not answer any questions without prior approval from D&C.
- All departments and schools will take care to not stretch or change the logo from its original shape.
- All departments and schools will take care to use approved fonts and colors.

Tracking Gifts and Receipting Donors
- Schools will deliver all incoming checks/payments through the Instituto front desk. This ensures all relevant parties will be notified through the daily log.
- D&C is responsible for providing receipts to donors (both individuals and organizations). The department's standard is to send "Thank-You" receipts within 24-hours of receiving official notification of any gift awarded to the schools.
- D&C will maintain accurate records of donations made to the schools to facilitate cultivation of relationships with current, past, and potential funders. Shannon Ghere will provide access to information in those records as requested.

- D&C will notify appropriate school representatives when it receives notifications about pending grants and other updates on proposals, required reports, and visits from funders. School leaders and Instituto administrative personnel will share information similarly.
- Schools will notify D&C of additional funds raised (i.e. school dances, bake sales, etc.) with the amount of money that was raised. When possible, donor contact information should also be provided to D&C. The D&C team will support the acquisition of donations as needed, including the use of Square technology, donations made through Instituto's website, and other technology used to collect donations by staff.

Social Media

D&C is responsible for managing all social media accounts, including Facebook and Twitter. However, we very much encourage other departments and schools to send photos, articles, and information related to events and programming to be posted on Social Media.

- Send photos and links with relevant information for suggested posts to Shannon Ghere via email.
- Departments/Schools may write the posts if they wish, which may then be edited by D&C to ensure uniformity in style, voice, and content.
- D&C will communicate with Departments/Schools about content as needed.
- It is the Department/Schools responsibility to ensure that all parties identifiable in the photos have signed photo release forms.
- If there is information that should be posted by a specific date, please submit the content to D&C at least two days prior.

To further promote Instituto and its schools, staff is encouraged to like/follow Instituto's social media and share content with their personal networks.

Note that any other web-based, communication platforms that represent Instituto will be managed by D&C. If a staff member is interested in creating or joining a new online platform that will represent Instituto, any of its programs, or schools, they should discuss this with D&C prior.

D&C Fundraising Work Division

- Kim Christensen and Chris Boyce are brought in for larger proposal projects (such as United Way, WIA, etc.), major gifts, individual giving, and communications efforts.
- Rosemary Caruk is dedicated to Instituto del Progreso Latino (Instituto) funding opportunities and as such will be the point person.
- Karla Rivera is dedicated to Instituto Health Sciences Career Academy (IHSCA), Instituto Justice and Leadership Academy (IJLA), and IDPL Youth Development Department funding opportunities and as such will be the point person.
- Yvonne Nieves is the point person for all things volunteering.
- Shannon Ghere is the point person for the department's gift tracking and grant calendar, additionally providing support on writing and editing grants as needed.

D&C Communications Work Division

- Kim Christensen and Chris Boyce handle media requests, website, and annual report
- Karla Rivera manages video projects, e-newsletter, and print requests for schools
- Rosemary manages print requests for Instituto del Progreso Latino
- Shannon Ghere manages Social Media, along with the department's interns, Ozie and Tania

Instituto | Development and Communications Department FY14 Workplan	
Objective	To generate funds outlined in FY14 budgets for Instituto del Progreso Latino, Instituto Health and Science Career Academy, and Instituto Justice and Leadership Academy; to build Instituto's overall brand; to increase public awareness around Instituto's mission; to expand the capacity of volunteer services; and to ensure effective delivery of departmental programs and services.
Goals	■ Secure $XX,XXX,XXX in funding for Instituto del Progreso Latino, IHSCA, and IJLA.
	■ Research, qualify, cultivate, solicit, and steward government agencies.
	■ Research, qualify, cultivate, solicit and steward corporate and private foundation partners.
	■ Culitivate/engage and steward community partners and volunteers.
	■ Research, qualify, cultivate, solicit, and steward individual donors.
	■ Develop and implement cultivation and fundraising events.
	■ Participate third-party giving.
	■ Maintain and grow volunteer capacity across organizations.
	■ Implement an in-kind donation program.
	■ Create and implement Instituto marketing and public relations strategies.
	■ Develop and maintain information systems and moves management system.
	■ Implement and support staff development activities.
	■ Secure $X,XXX,XXX in government contracts: $X,XXX,XXX in support of Instituto and $X,XXX,XXX for the Charters.
	☐ Renew city, state and federal grant contracts in coordination with Program Directors and grants compliance team as needed, totaling $X,XXX,XXX for Instituto and $X,XXX,XXX for the Charters.

☐ Research and qualify additional government grant opportunities in coordination with Program Directors and Grants Compliance Team. Submit funding proposals when applicable, with the goal of meeting prospecting $X,XXX,XXX needs of Instituto and the $X,XX,XXX for the Charters.

☐ Ensure contract compliance and reporting with Grants Committee by providing contract guidelines and budgets when applicable

☐ Create system of communication and notification on exisitng and perspective govt. grants, and for planning prior to application

■ Raise a total of $X,XXX,XXX in private and corporate foundation grant renewals and $X,XXX,XXX in prospects for Instituto and the Charters.

☐ Submit application totaling 150% of Need for programs for both Instituto and Charters in new and renewal foundation and corporate grants. Including $XXX in renewals for Instituto, $XXX for IHSCA, and $XXX for IJLA.

☐ Conduct analysis of all grant templates/boilers and update utilizing research, reports, workplans, program staff.

☐ Maintain master grant calendar to coordinate with development staff and compliance team regarding new and renewal proposal due dates, report due dates, and prospecting reminders.

☐ In collaboration with staff, board members, and others, identify and qualify 15 new foundation or corporate prospects for Instituto and 5 for the Charters per quarter.

☐ Complete grant reports as needed and requested, and in accordance with stated deadlines and contract agreements in coordination with the grants compliance team.

☐ Engage appropriate staff members strategically in site visit process.

■ Engage in Donor Cultivation and Giving Activities.

☐ Develop board and staff trainings around individual cultivation and solicitation, including standardized materials.

☐ Develop and maintain an internal events calendar and share with staff and board members to enable seamless cultivation opportunities.

- ☐ Develop and maintain an external events calendar and share with public for seamless cultivation opportunities/ and make available to internal recruitment team.

- ☐ Design a Visitor's Program and make available to board members and donors.

- ☐ Research and write case studies of Instituto participants and Charter families with the intent to share with board members, donors, and community.

- ☐ Process and send gift acknowledgements within two business days for individual gifts and within one week for events.

- ☐ Coordinate a personalized thank you system that is an extension of TY receipts, including phone calls, personalized emails, meet & greets, etc.

- ☐ Communicate with all individual donors between 6 and 10 times each year via publications, invitations, phone calls, visits, and events.

- ■ **Increase number of individual donors and dollars raised for a total of $27,000.**

- ☐ Design and launch "Yo soy Instituto", I am Instituto, campaign.

- ☐ Design and write a "One Instituto" Annual Report and Appeal.

- ☐ Activitely manage a Major Gift Program (non-board) in partnership with Instituto leadership.

- ☐ In collaboration with President/CEO and board chairs, identify board member giving and cultivation goals for the year

- ☐ Strategically engage family foundations

- ☐ Direct e-blasts/asks as part of themed campaigns

- ■ **Raise $300,000 through the implementation of Alta Cocina and further cultivate donors by designing and hosting a One Insituto Graduation Ceremeony.**

Deliverables	
□	Raise $300,000 through annual gala event, Alta Cocina including corporate sponsorship, ticket and table sales, and day-of revenue.
□	Design and launch in partnership with Instituto leadership a "One Instituto" Graduation.
■	**Raise $9,000 through Third-Party Giving.**
□	Research and sign-up for Community Shares of Illinois, workplace giving option.
□	Make Goodsearch.com the standard search engine across Instituto and Charters
□	Incorporate Funding Factory into daily activities at Instituto.
□	Support and promote house parties across Instituto stakeholders.
□	Develop materials and promote non-event third-party fundraising.
□	Support third-party fundraisers for schools, programs, and misc.
■	**Implement an in-kind donation program.**
□	Create and implement in-kind donation program and procedures in collaboration with program staff and leadership.
□	Process acknowledgements for all donations in accordance to donation policy. Develop tracking system via Raiser's Edge as needed.
□	Share wish list and giving policy.
■	**Maintain and grow volunteer capacity across organizations.**
□	Assess volunteer needs across all three organizations.
□	Identify areas to insert volunteers in development activities and cross-department collaborations.
□	Host volunteer luncheons and develop and initiate recognition acitivities.
□	Implement volunteer protocals and strategies.

- ☐ Develop volunteer recruitment materials and strategies.

- ☐ Strategize and implement volunteer giving.

- ■ **Create and implement Instituto marketing and public relations strategies.**

- ☐ Write and implement identified communications protocals.

- ☐ Create branding standards for all Instituto materials, including logo use, color pallets, and font (for website and printed publicity materials such as business cards, letterhead, departmental materials, TY cards, annual report, brochures, welcome packets, folders, etc.).

- ☐ Populate Development area within Instituto Intranet

- ☐ Create and implement publication standards and calendar in accordance to individual giving activities. Develop, produce and update collateral materials including, but not limited to annual report, appeals, newsletters, monthly e-newsletters, brochures, program outreach materials, event collatoral, and other items as needed and requested.

- ☐ Create and implement media outreach strategies and calendar. Produce media alerts, and press releases for events and initiatives when appropriate. Develop media response guidelines and respond to inquiries accordingly.

- ☐ Create and implement social media standards and procedures (Facebook, LinkedIn, Twitter, YouTube, etc.). Develop a style guide for all Instituto electronic postings.

- ☐ Finalize the Instituto new website to reflect one instituto and umbrella brand. Most importantly, with individual donors in mind.

- ☐ Standardize outreach look/kit and materials, creating a consistent umbrella brand - including signage inside buildings.

- ☐ Develop and implement merchandse plan.

- ☐ Begin video pilot program

- ☐ In collaboration with President/CEO, Vice President of Education for Programs, board members, and program directors attend and/or present at conferences when applicable.

	■ Maintain information and moves management system.
	☐ Update software as needed and available, including auction software, Outlook Express, and online giving option, and others.
	☐ Continual update of data entry standards as use of database expands.
	☐ Maintain gift processing standards in partnership with the Finance and Administration Departments, including reporting on confirmed funds.
	☐ Stregthen moves management.
	☐ Create Raiser's Edge Manual
	☐ Train Development staff on Raiser's Edge essentials.
	■ Implement and support staff development activities.
	☐ Facilitate weekly team meetings (or as frequently as needed for special projects).
	☐ Facilitate retreats twice a year to collaborate on departmental goals and build team work.
	☐ Conduct individual meetings once a month with each departmental member or as needed for special projects.
	☐ Conduct assessments at fiscal year-end for each departmental member.
	☐ Identify individual staff development goals, relevant training opportunities, and implement as approved.

Instituto | Development Department FY14 Workplan | Quarterly Implementation Plan				
Goals and Deliverables	July-September	October-December	January-March	April-June
■ Secure $X,XXX,XXX in government contracts: $X,XXX,XXX in support of Instituto and $X,XXX,XXX for the Charters.	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐ Renew city, state and federal grant contracts in coordination with Program Directors and grants compliance team as needed, totaling $X,XXX,XXX for Instituto and $X,XXX,XXX for the Charters.	Continual coordination and renewal as needed in coordination with program directors and grants compliance team	Continual coordination and renewal as needed in coordination with program directors and grants compliance team	Continual coordination and renewal as needed in coordination with program directors and grants compliance team	Continual coordination and renewal as needed in coordination with program directors and grants compliance team
☐ Research and qualify additional government grant opportunities in coordination with Program Directors and Grants Compliance Team. Submit funding proposals when applicable, with the goal of meeting prospecting $X,XXX,XXX needs of Instituto and the $X,XX,XXX for the Charters.	Continual coordination on research and applications as needed in coordination with program directors and grants compliance team	Continual coordination on research and applications as needed in coordination with program directors and grants compliance team	Continual coordination on research and applications as needed in coordination with program directors and grants compliance team	Continual coordination on research and applications as needed in coordination with program directors and grants compliance team
☐ Ensure contract compliance and reporting with Grants Committee by providing contract guidelines and budgets when applicable	Continual coordination with Grants compliance via monthly meetings.	Continual coordination with Grants compliance via monthly meetings.	Continual coordination with Grants compliance via monthly meetings.	Continual coordination with Grants compliance via monthly meetings.
☐ Create system of communication and notification on exisitng and perspective govt. grants, and for planning prior to application	Survey Program Directors on government grant status and history.	Begin basic tracking of Gov. grants in Raiser's Edge and continue ongoing communication regarding gov. grants.	Ongoing communication regarding government grants.	Ongoing communication regarding government grants.
■ Raise a total of $X,XXX,XXX in private and corporate foundation grant renewals and $X,XXX,XXX in prospects for Instituto and the Charters.	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐ Submit application totaling 150% of Need for programs for both Instituto and Charters in new and renewal foundation and corporate grants. Including $XXX in renewals for Instituto, $XXX for IHSCA, and $XXX for IJLA.	Continual colaboration with relevant parties (such as Department/project heads, accounting, Dr. E, Juan, and Grants Compliance team) to communicate, create, and submit proposals. Review systems of communication and collaboration as needed.	Continual colaboration with relevant parties (such as Department/project heads, accounting, Dr. E, Juan, and Grants Compliance team) to communicate, create, and submit proposals. Review systems of communication and collaboration as needed.	Continual colaboration with relevant parties (such as Department/project heads, accounting, Dr. E, Juan, and Grants Compliance team) to communicate, create, and submit proposals. Review systems of communication and collaboration as needed.	Continual colaboration with relevant parties (such as Department/project heads, accounting, Dr. E, Juan, and Grants Compliance team) to communicate, create, and submit proposals. Review systems of communication and collaboration as needed.
☐ Conduct analysis of all grant templates/boilers and update utilizing research, reports, workplans, program staff.	Analyze all program templates and language. Create calendar for continual renewal. Create OnNote data sheets to assist continual updates of templates/proposals.	Write/create new narrative templates.	Implement and assess.	Implement and assess.
☐ Maintain master grant calendar to coordinate with development staff and compliance team regarding new and renewal proposal due dates, report due dates, and prospecting reminders.	Maintain calendar.	If needed, integrate Grant's Calendar with Raiser's Edge.	Maintain calendar.	Maintain calendar.
☐ In collaboration with staff, board members, and others, identify and qualify 15 new foundation or corporate prospects for Instituto and 5 for the Charters per quarter.	Establish a schedule for prospecting and qulifying meetings bi-monthly among development staff.	Continual meeting to discuss and qualify grant opportunities.	Continual meeting to discuss and qualify grant opportunities.	Continual meeting to discuss and qualify grant opportunities.
☐ Complete grant reports as needed and requested, and in accordance with stated deadlines and contract agreements in coordination with the grants compliance team.	Continual coordination for creating and submitting reports via monthly meetings.	Continual coordination for creating and submitting reports via monthly meetings.	Continual coordination for creating and submitting reports via monthly meetings.	Continual coordination for creating and submitting reports via monthly meetings.

		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
☐	Engage appropriate staff members strategically in site visit process.	Create site-visit standards and protocols.	Communicate standards with Department heads. Begin including communication materials in site-visits as they develop with the communications plan.	Implement and assess.	Implement and assess.
■	**Engage in Donor Cultivation and Giving Activities.**	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐	Develop board and staff trainings around individual cultivation and solicitation, including standardized materials.	Kim discuss and strategize within Executive Cabinet about benefits of creating donor culture. Establish Super Development and Communications Committee (SDCC) to assess and develop a uniform giving strategy for all three Boards.	Assess current indivdual giving and cultivation process and environment. Audit internal competing fundrasiers and acitivites across organizations. Identify avenues to encourage participation in development activities in anticipation of a membership drive, etc.	Lead SDCC in assessment of giving objectives and creating a fundraising training, possibly for a Board retreat to be led by the committee. Research and develop resources and materials to guide board/staff involvement around individual cultivation and solicitation. Consider board cultivation challenge around membership drive.	Development in partnership with SDCC enacts additional prospecting activities across all boards. With staff, revisit ideas on staff giving and establish giving and volunteer opportunities for the staff.
☐	Develop and maintain an internal events calendar and share with staff and board members to enable seamless cultivation opportunities.	Establish Google events calendar as the official Instituto calendar - made visible on the Intranet.	Maintain regular communciation with programs and schools in regards to events that would be shared with the dept., enabling strategic recruitment of attendees.	Revisit and assess impact of the calendar. Update calendar.	Revisit and assess impact of the calendar. Update calendar.
☐	Develop and maintain an external events calendar and share with public for seamless cultivation opportunities/ and make available to internal recruitment team.	Launch "Mi Voz" on event webpage and make available to recruiters and staff for update. Add guidelines to style guilde and make available to staff.	Monitor and assess impact of the calendar. Update calendar.	Montitor and assess impact of the calendar. Update calendar.	Monitor and assess impact of the calendar. Update calendar.
☐	Design a Visitor's Program and make available to board members and donors.	Research similar programs to see how others utilize tours. Create script for the IHSCA building as a placeholder.	Developing tours for specific audiences and programs in collaboration with program directors and principals. Develop protocols for scheduling tours.	Finalize scripts. Identify point tour guides for non-donor and practice non-donor tours through trainings.	Implement and assess.
☐	Research and write case studies of Instituto participants and Charter families with the intent to share with board members, donors, and community.	Reach out to departments and schools. Schedule interviews with participants and staff as needed.	Create stories and segment per medium (video, newsletter, facebook, etc.)	Assess organization's most compeling stories. Gather and share stories regularly through communication vehicles, including emails to board, etc., for possible use for Alta Cocina.	Continue to collect stories, begin to develop and produce videos, correlate at least one of those to release of Annual Report in FY15.
☐	Process and send gift acknowledgements within two business days for individual gifts and within one week for events.	Revisit and assess TY as needed.	Revisit and assess TY as needed.	Revisit and assess TY as needed.	Revisit and assess TY as needed.
☐	Coordinate a personalized thank you system that is an extension of TY receipts, including phone calls, personalized emails, meet & greets, etc.	Identify levels of giving that require personalization and subsequently create TY segmentation. Brainstorm and research additional misson-centric gifts.	To encourage donor engagement, lead board and staff alike to interface with donors in more personalized way including, but not limited to, phone calls, emails, meet and greets, Instituto merchandise, etc.	Create official TY guidelines in connection to TY segmentation and gifts brainstorm.	Revisit and assesss board leadership and stafff participation.
☐	Communicate with all individual donors between 6 and 10 times each year via publications, invitations, phone calls, visits, and events.	Establish and coordinate individual service plans across deptartments to reflect activities.	Update according to additional departmental donor activites and resarch tracking systems within raisers edge	Implement tracking methodology.	Revisit and assess system as needed.

	Increase number of individual donors and dollars raised for a total of $27,000 ($15,000 Instituto) ($6,000 IHSCA) ($6,000 IJLA) *Based upon numbers from last year	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
☐	Design and launch "Yo soy Instituto", I am Instituto, campaign.	Design campaign and weave into donor cultivation and ask activities, launch in conjunction with fall giving	Weave campaign into website, facebook, annual report, an e-ask and make available via hard copy for programs/charters	Focus on program participants and Charters and include in Alta Cocina invite	Final year-end push, including e-ask and One Instituto Graduation event
☐	Design and write a "One Instituto" Annual Report and Appeal.	Start designing, interviewing, and writing in partnership with the SDCC	Print and send annual report with appeal - concurrently post on website/facebook with story		Begin planning for FY15 annual report
☐	Activitely manage a Major Gift Program (non-board) in partnership with Instituto leadership.	Identify and qualify current major gifts, single gift $1,000+ and work with Juan for further prospecting - decide on target numbers and amounts	In partnership with Juan, SDCC, and boards strategically engage identified donors - tie to year-end giving	Continue to engage/cultivate donors and invite to Alta Cocina	Final year-end push, make strategic asks (warmer) of those who did not attend Alta Cocina and who have not given yet
☐	In collaboration with President/CEO and board chairs, identify board member giving and cultivation goals for the year	Establish goals and objectives for each board member, galvinized around board challenge and individual capacity	Engage board members in departmental cultivation activities, including the communication of expanded giving options	Continue to engage board members with a special focus on Alta cocina	Wind down year and make final asks based upon performance and year-end close-out
☐	Strategically engage family foundations	Identify current family foundations and create list of prospects - work with Juan, SDCC, and boards to identify connections and engagement strategy	Work with Juan, SDCC, and boards to engage family foundations	Continue to engage/cultivate family foundations - invite to Alta Cocina	Continue to engage/cultivate family foundations - invite in "One Instituto" graduation
☐	Direct e-blasts/asks as part of themed campaigns	Back to school campaign (e-newsletter, e-blast, Facebook, and website)	Season of Giving campaign using the annural report (e-newsletter, e-blast, Facebook, video, and website)	MLK Day Celebration campaign using AmeriCorps service day as inspiration (e-newsletter, e-blast, Facebook, video, and website)	Scholarship One Instituto Gradution campaign (e-newsletter, e-blast, Facebook, video, and website)
■	Raise $300,000 through the implementation of Alta Cocina and further cultivate donors by designing and hosting a One Insituto Graduation Ceremeony. *Based upon numbers from last year. *Based upon last year's numbers	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
☐	Raise $300,000 through annual gala event, Alta Cocina including corporate sponsorship, ticket and table sales, and day-of revenue.	Alta Cocina planning meetings start in September. Projected expenses and revenues for 2014 event confirmed. Recruited additional members to subcommittee. Begin corporate sponsorship, table host, and auction item procurement.	Continue corporate sponsorship, table host, and auction procurement. Development event collateral.	Finish continue corporate sponsorship, table host, and auction procurement. Implement event.	Clean up and evaluate the event. Confirm next year's location and program participants.
☐	Design and launch in partnership with Instituto leadership a "One Instituto" Graduation.	Introduce idea to diretors and cabinet.	Roll out plan for implementation in collaboration with cabinet and education management team.	Solidify program in partnership with education team.	Implement event.
■	Raise a total of $9,000 through Third-Party Giving. ($4,000 Instituto) ($4,000 IHSCA) ($1,000 IJLA) *Based upon last year's numbers	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
☐	Research and sign-up for Community Shares of Illinois, workplace giving option.	Sign up for Community Shared of Illinois	Research and establish strategy, recruit volunteer assistance	Harness volunteer assistance in implementing strategy	Assess implementation

		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
☐	Make Goodsearch.com the standard search engine across Instituto and Charters	Utilize an Escalera student summer intern to install Good S`earch on Instituto computers, also send all staff & board emails, encouraging them to utilize search engine	Continue to utilize departmental interns to install Good Search on Instituto computers, continue to promote including utilizing Facebook, e-newsletters, and website	Conduct internal audit, reach out across organization to participate	Assess outcomes
☐	Incorporate Funding Factory into daily activities at Instituto.	Create Instituto account and identify ways to interface with Funding Factory	Develop plan and create structure in partnership with Facilities Department	Implement plan	Continue implementation and conduct an assessment of outcomes
☐	Support and promote house parties across Instituto stakeholders.	Develop support materials (how-to) and identify board members who will be conducting house-parties and support their efforts	Promote house-parties on website, e-newsletter, board meetings, and Facebook	Continue to promote and support as necessary	Continue to promote and support as necessary
☐	Develop materials and promote non-event third-party fundraising.	Conduct research, utilizing established departmental materials	Promote thrid-party fundraising on website, e-newsletter, board meetings, and Facebook	Continue to promote and support as necessary	Continue to promote and support as necessary
☐	Support third-party fundraisers for schools, programs, and misc.	Work with school leadership to provide consultation where needed regarding school fundraising efforts with PTA, sports teams, traveling clubs, etc. Identify one specific project as part of development's school service plans to play a more active and central role - additionally, support IHSCA and IJLA boards and related groups in event activities	Confirm strategy to address the one specific project for each school with leadership and start to implement, continue to provide consultation or support elsewhere as appropriate and when needed	Continue to partner with each school regarding specific project and providing consultation and support elsewhere as appropriate and when needed	Wrap-up efforts regarding specific project for each school
■	**Implement an in-kind donation program.**	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐	Create and implement in-kind donation program and procedures in collaboration with program staff and leadership.	Reach to directors to discover department needs. Develop strategies in response. Utilize existing materials from Kim to develop in-kind donation materials. Explore www.givesomething.org	Develop marketing pitch to audiences, think about how to roll out to different groups - determine who will want to donate.	Implement	Assess
☐	Process acknowledgements for all donations in accordance to donation policy. Develop tracking system via Raiser's Edge as needed.	Update letters for in-kind donations as needed.	Develop system and procedure for tracking and receipting. Coordinate with Finance to align tracking methodology regarding in-kind donations.	Continue activities	Assess
☐	Share wish list and giving policy.		Launch the marketing pitch and share information on ways to donate via website, intranet, e-newsletter.	Roll-out mass e-mail to staff and board to disseminate to Instituto departments.	
■	**Maintain and grow volunteer capacity across organizations.**	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐	Assess volunteer needs across all three organizations.	Develop and implement an assets and needs survey	Analyze data and develop strategy to meet the needs of the programs	Implement the strategy based on qualitative and quantitative data	
☐	Identify areas to insert volunteers in development activities and cross-department collaborations.	Managed interns and departmental volutneers	Managed interns and departmental volutneers	Managed interns and departmental volutneers. Identify additional activies for the intern	Develop a tracking system for volunteer alumni in partnership with the Development Associate. Recruit volutneer participation for Alta Cocina
☐	Host volunteer luncheons and develop and initiate recognition acitivities.		Coordinate attendance at the Instituto Thanksgiving event and recognize misc. volunteers		Include all Americorps volunteers recognition in One Instituto graduation

		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
☐	Implement volunteer protocals and strategies.		Fomalize protocols and strategies		
☐	Develop volunteer recruitment materials and strategies.			Fomalize protocols and strategies	
☐	Strategize and implement volunteer giving.		Facilitate volunteer meeting and implementtion of volunteer in-kind donation drive	Connect volunteers with potential sponors as Alta Cocina opportunities	
■	**Create and implement Instituto marketing and public relations strategies.**	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐	Write and implement identified communications protocals.	Finish working departmental protocols document.	Roll out protocols document to all leadership (Exec. Cabinet, IHSCA cabinet, IJLA staff) in Sept./Oct.	Ongoing implementation.	Ongoing implementation.
☐	Create branding standards for all Instituto materials, including logo use, color pallets, and font (for website and printed publicity materials such as business cards, letterhead, departmental materials, TY cards, annual report, brochures, welcome packets, folders, etc.).	Develop communications process for RFP bids, vendor selection and volunteer engagement. Streamline formalized printing process.	Finalize and implement approved communications and printing processes.	Edit and update branding standard on brochures and department specific materials for all 501(c)(3)s.	Revisit to assure consistency.
☐	Populate Development area within Instituto Intranet	Assess what is missing and what needs to be changed and updated. Make Google calendar official calendar visible on Intranet. Begin to research Intranet options.	Assess new options in intratnet implemention. Explore Taproot Foundation as a resource.	Populate Development section with current materials and information.	Announce updates and implement workshops. Create materials.
☐	Create and implement publication standards and calendar in accordance to individual giving activities. Develop, produce and update collateral materials including, but not limited to annual report, appeals, newsletters, monthly e-newsletters, brochures, program outreach materials, event collatoral, and other items as needed and requested.	Create the Instituto style guide.	Audit materials. Share style guide across the organization.	Audit and assessment of implementation. Create templates for use across the organization.	Share templates get feedback and general roll out.
☐	Create and implement media outreach strategies and calendar. Produce media alerts, and press releases for events and initiatives when appropriate. Develop media response guidelines and respond to inquiries accordingly.	Formalizing what the system should be. Develop pathway and strategy to engaging media relationships.	Creating templates for press releases and policies & protocol for staff contact with media.	Roll out media protocols with leadership, partnering with them to work with staff.	Continued implementation on rollout. Established channels for media engagement.
☐	Create and implement social media standards and procedures (Facebook, LinkedIn, Twitter, YouTube, etc.). Develop a style guide for all Instituto electronic postings.	Unify all Facebook pages. Eliminate extraneous pages. Explore and research design for subgroups within main FB page.	Create FB protocols, incorporate within style guide. Register check-in locations for FB, FourSquare, etc.	Explore "#Dr.E.",conversation starter as official Instituto perspective & voice.	Continue standards and policies.
☐	Finalize the Instituto new website to reflect one instituto and umbrella brand. Most importantly, with individual donors in mind.	Write RFP for web design and release. Research City Colleges of Chicago, UNO and Noble Street websites. Decide new site structure based on models.	Work with web designer to create new site. Launch.	Update site. Share with leadership and Boards.	Update as needed.
☐	Standardize outreach look/kit and materials, creating a consistent umbrella brand - including signage inside buildings.	Research and price outreach tooklit: table skirt, foam boards, etc. Establish new signage reflecting mission in Instituto buildings.	Order Toolkit, create check-out process. Request materials from departments and schools.	Replenish outreach materials as-needed.	Replenish outreach materials as-needed.
☐	Develop and implement merchandse plan.	Research what other organizations provide. Determine the costs and options - with targeted sales plan for specific projects.	Develop merchandise list with goal to pilot merch table at Alta Coina and One Instituto graduation.	Assess popularity and success of the pilot.	Re-order merchandise for FY15 based on success of pilot.

		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
☐	Begin video pilot program	Brainstorm ideas, including potential for participant or employee story booth. Ascertain tech needs and strategies to obtain resources.	Early development for Alta Cocina video. Begin process of doing 1 video per department.	Assess videos and production process.	Continue assessment and production process.
☐	In collaboration with President/CEO, Vice President of Education for Programs, board members, and program directors attend and/or present at conferences when applicable.	Establish protocols and templates for public presentations made by leadership.	Schedule presentations with presenters as needed.	Schedule presentations with presenters as needed.	Schedule presentations with presenters as needed.
■	**Maintain information and moves management system.**	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐	Update software as needed and available, including auction software, Outlook Express, and online giving option, and others.	Finish research and choose products in regards to auction software, online giving, and possibly other Raisers Edge options including newsletter, outlook express, ect.	Learn auction software to prepare for Alta Cocina. Incorporate online giving software with launch of the website. Begin tracking touchpoints with donors via Raiser's Edge. Implement other software if decided on.	Maintain systems and data.	Maintain systems and data.
☐	Continual update of data entry standards as use of database expands.	Continual creation of standards and begin quarterly data health assesment and clean up.	Quarterly data health assesment and clean up and continual creation of standards as needed.	Quarterly data health assesment and clean up and continual creation of standards as needed.	Quarterly data health assesment and clean up and continual creation of standards as needed.
☐	Maintain gift processing standards in partnership with the Finance and Administration Departments, including reporting on confirmed funds.	Organize notification of payments not made through the mail (ie wire transfers) and connect with IJLA on gift processes. Continual monitoring of systems and adapt as needed.	Continual monitoring of systems and adapt as needed.	Continual monitoring of systems and adapt as needed.	Continual monitoring of systems and adapt as needed.
☐	Stregthen moves management.	Create easy, accessible tools within the database. Train staff on use of these tools.	Incorporate move management into additional fundraising strategies.	Continual use and improvement.	Continual use and improvement.
☐	Create Raiser's Edge Manual	Create manual with current RE standards and policies.	Update as needed and use in trainings.	Update as needed and use in trainings.	Update as needed and use in trainings.
☐	Train Development staff on Raiser's Edge essentials.	Train staff generaly on Raiser's Edge and to meet their specific needs.	Follow up support and additional training as needed as new systems are incorporated with Raiser's Edge.	Review of Raiser's Edge training with staff to prepare for Alta Cocina.	Continued upport.
■	**Implement and support staff development activities.**	**First Quarter**	**Second Quarter**	**Third Quarter**	**Fourth Quarter**
☐	Facilitate weekly team meetings (or as frequently as needed for special projects).	Scheduled department meetings; Fridays at 10 am	Continue scheduled weekly meeting	Continue scheduled weekly meeting	Continue scheduled weekly meeting
☐	Facilitate retreats twice a year to collaborate on departmental goals and build team work.		One-day retreat in November to revisit implementation plan execution and professional development		Two-day retreat in June to plan for the following fiscal year, produce an updated work/implementation plan
☐	Conduct individual meetings once a month with each departmental member or as needed for special projects.	Establish and schedule individual meetings with each departmental member	Continue scheduled montly meetings	Continue scheduled montly meetings	Continue scheduled montly meetings
☐	Conduct assessments at fiscal year-end for each departmental member.			Begin process according to HR instructions and timing	Finish process according to HR instructions
☐	Identify individual staff development goals, relevant training opportunities, and implement as approved.	As per identified goals in annual assessment, work with each departmental member to identify professional development/training opportunities	Schedule and follow-through with professional development/training opportunities	Revisit departmental goals and subsequent training opportunities	Finish scheduled trainings, assess experiences in concert with annual assessment

Our mission is to build long-term relationships through storytelling, tailored for different audiences.

We promise to support each other in utilizing our strengths to accomplish this mission in the following ways:

1.) Lean on one another and employ their strengths;

2.) Allow the flexibility to enable collaborative solutions;

3.) Support and challenge one another in taking risks and trying new things;

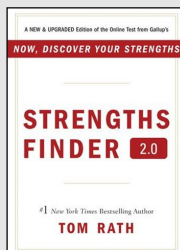4.) Celebrate teamwork and our strengths;

5.) Support each other through the learning process.

StrengthsFinder 2.0
& Now, Discover Your Strengths
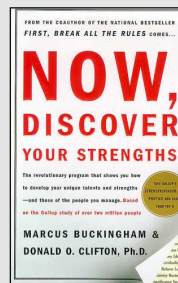
Book Summary

Updated February 2012

Provided by:
StrengthsTest.com

STRENGTHS TEST

STRENGTHSFINDER 2.0 & NOW, DISCOVER YOUR STRENGTHS BOOK SUMMARY:
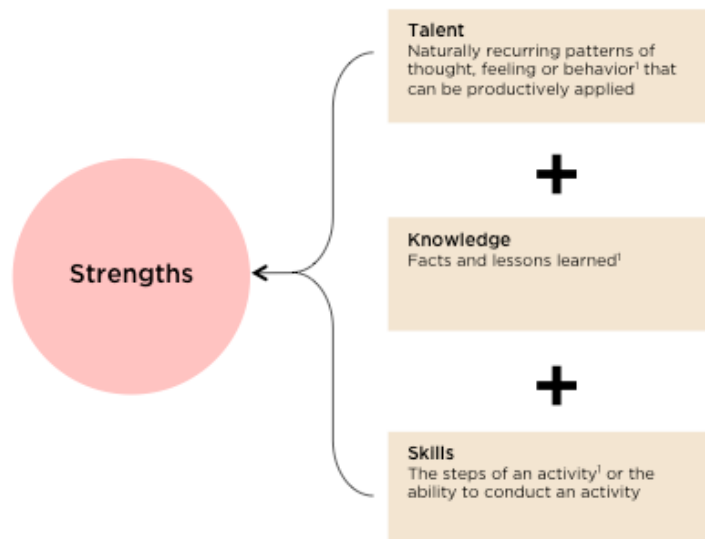
Key Takeaway:

1. Each person's talents are enduring and unique.
2. Each person's greatest potential for growth is in the area of his or her greatest strength.
3. As an organization or as an individual I/we can:
   a. Reach our maximum potential only by using our individual strengths
   b. Match my/our strengths to our roles at work, home and in the community
   c. Enjoy what we are doing because we are using our true talents

Action Items:

1. Determine my individual strengths (and/or my team's strengths)
2. Analyze results
   a. Identify strengths and match to role (example: "Communicators" are probably our best teachers)
   b. Identify opportunities to use my/our strengths

Key Concept:

Strengths are a combination of your talent, knowledge, and skills.

Talent
Naturally recurring patterns of thought, feeling or behavior[1] that can be productively applied

+

Strengths

Knowledge
Facts and lessons learned[1]

+

Skills
The steps of an activity[1] or the ability to conduct an activity

Source: 1) Marcus Buckingham and Donald Clifton, Now Discover Your Strengths (New York, NY: The Free Press, 2001) 29. Visual: Brad Pugh, The Fit Factors (Atlanta, GA: Strengths Publishing, 2012), 22.

Key statements from the book:

"Most Americans do not know what their strengths are. When you ask them, they look at you with a blank stare, or they respond in terms of subject knowledge, which is the wrong answer."
—   Peter Drucker

Unfortunately, most of us have little sense of our talents and strengths, much less the ability to build our lives around them. Instead, guided by our parents, by our teachers, by our managers, and by psychology's fascination with pathology, we become experts in our weaknesses and spend our lives trying to repair these flaws, while our strengths lie dormant and neglected.

What to do: Identify their talents, build them into strengths, and enjoy consistent, near-perfect performance.

When you exploit your natural abilities, you can't help but succeed. Of course, the converse is also true. Expect an uphill climb if you are always in "self-improvement" mode.

The Online Assessment / Test: Clifton StrengthsFinder

The Gallup research has identified 34 dominant "themes" of talent with thousands of possible combinations. The online assessment shows someone taking the assessment what their top 5 themes are and provides additional information relevant to those themes.

Each copy of the book New Discover Your Strengths and StrengthsFinder 2.0 contains a unique access code to take the online assessment. Alternatively, you can buy an access code at www.strengthstest.com

---

Full Book Summary: "**Now, Discover Your Strengths**" by Marcus Buckingham and Donald O. Clifton

Summary written by Bob Andros (http://onbobsmind.com/2008/06/12/now-discover-your-strengths/ & http://docs.google.com/Doc?docid=dgjx2tmq_1fs2nqb&hl=en)

Premise

- We spend too much time focusing on our weaknesses and trying to make them stronger, rather than recognizing our strengths and trying to capitalize on them.
- Companies make 2 incorrect assumptions:
  1. That a person can become competent at anything if they are trained properly; thus they spend a lot of time training their workforce.
  2. That the greatest areas of "opportunity" or growth are in an employee's area of greatest weakness. Thus the individual development plan for an employee will often focus on these areas of weakness or work to minimize them.
- Instead, these assumptions should be made:
  1. Each person's talents are enduring and unique (i.e. they were born with them and will always have them)
  2. Each person's greatest room for growth is in their area of greatest strength
- Using data collected over the last 30 years (over 2 million completed surveys), the authors created 34 "themes of human talent", or strengths (See Appendix A).

Goal

- *This book seeks to help readers identify their "unique" strengths and then use those strengths to improve yourself and those you manage.*

Book Notes

- Definition of Strength: Consistent near perfect performance in an activity
  1. For something to be a strength, you must be able to do it consistently and predictably
  2. People excel by maximizing strengths, not by fixing their weaknesses.
     - One exception is that "fatal" weaknesses must be addressed. Can also learn to manage around your weaknesses. An example would be a manager hiring someone who has great attention to detail, since they know that is something they lack that is needed for the team they manage.
  3. Strength = Talent + Knowledge + Skills
     - Talent – naturally recurring patterns of thought, feeling or behavior that can be productively applied
       → Usually talents come so easily to us that we don't recognize them as talents. We assume everyone can do the same things.
     - Knowledge – facts and lessons learned
       → Factual knowledge – knowing product features or protocols, etc.
       → Experiential knowledge – learned through experience
     - Skills – the steps of an activity
       → Skills bring structure to experiential knowledge.

→ Skills will help you perform but not necessarily excel. For example, you may learn some of the basic steps of public speaking and even become a better public speaker than you were before. But without the natural talent, you will never be great at it.

- A person cannot have a strength without having the requisite talent. You may develop the knowledge and skills to get by, but without the talent you won't be able to achieve consistent, near perfect performance.

- The key to building a strength is to first identify your dominant talents, then refine them with knowledge and skills.

- Example: If you sign up for classes on leadership or empathy or assertiveness or public speaking, you will not see dramatic improvement unless you have the natural talent for one of these. This is diverting your energy toward damage control (fixing weaknesses) and not toward real development.

- Every day there are hundreds of small decisions to make. We are unable to intellectualize every little decision, so we react instinctively. This means our brain takes the quickest path to making the decision, which results in using your natural talents to make these smaller decisions. These smaller decisions ultimately add up to a person's performance for the day, then the week, then the year.

- Even skills training classes that are followed up with ongoing support after the training, will not be fruitful without a person having the natural talent.

- Talents not only come naturally to us, but are also accompanied by an "it feels good" quality. So it not only feels natural to use them, it also feels *good* to use them, thus constantly pushing us towards using our talents again and again.

How do I discover my talents?

1. Monitor your spontaneous, top-of-mind reactions to the situations you encounter.
2. Also monitor these 3 things:

- Yearnings – activities you are drawn to naturally, particularly at a young age. You may not heed the desire to cultivate them because you are busy doing other things, but they will keep "calling out" to you.

- Rapid Learning – An ability to rapidly learn a new skill will give us clues to a talent's presence.

- Satisfactions – Since it "feels good" to use a talent, if doing something makes you feel really good or satisfied, it may be a natural talent. This shouldn't be confused with the idea that "if it feels good, do it". Obviously this applies to productive behaviors only, as the definition of talent implies.

- The best way to pinpoint talents is to monitor your behavior and feelings over an extended period of time. Or, you can take a StrengthsFinder test (Online test. Code comes with purchase of book) that helps identify these natural talents. The StrengthsFinder test identifies 34 different areas of talent and tells you your top 5 areas (See Appendix A for the complete list of the 34 areas of talent).

Obstacles to Building One's Strengths

- **Fear of weakness** – Inherent in our upbringing. If a child comes home with 5 A's and 1 F, what grade gets the most attention? While it may be necessary to manage around our weaknesses if they interfere with our strengths, focusing only on weaknesses will only help us prevent failure. It will not help us reach excellence. Excellence is reached only by understanding and cultivating strengths.

Purchase Clifton StrengthsFinder access codes at www.strengthstest.com

- **Fear of failure** – some failures are easy to handle (when it's not something we are good at), but when we fail while doing something that plays to our strengths, that can be difficult to handle. The process of "act, learn, refine, act, learn, refine…" is the essence of strong living.
    1. Delusion, or not realizing you are failing, is one danger. Denial, or finding reasons why your failures have nothing to do with you, is another danger. Delusion and denial together are a lethal combination.
- **Fear of one's true self** – You are so used to having and using your strengths that they seem very common to you and you don't feel like you have anything that makes you unique. You may assume that "everyone does things this way". Or you may suspect that your accomplishments are a result of circumstance or luck, and not your strengths. This is not the case. Your instinctive reactions are unique and set you apart.

Why am I different from other people with similar themes?

- There are 33 million combinations of the top 5 themes, so it is unlikely you will meet anyone with the same themes in the same order.
- Each of your top 5 themes is so interwoven with the others that it is modified by association.
- Try not to examine themes in isolation, but examine how each one modifies the others, and what the combination effect is.

How do I manage around my weaknesses?

- **Weakness** – anything that gets in the way of excellent performance
- The absence of any of these themes is not a weakness if you do not need that theme to be successful in work or life. It becomes a weakness only when you find yourself in a role that requires you to play to one of your non-talents.
- First, identify if the weakness is a skills weakness, a knowledge weakness or a talent weakness. If it's hard to figure this out, go acquire the skills and knowledge you need in a certain area, and if your performance is still subpar, then you probably lack the talent.
- Five other strategies for dealing with weakness:
    1. Get a little better at it – for basic things (communicating, listening, organization), you need some level of ability or they will undermine your real strengths.
    2. Design a support system – it might involve getting a Palm Pilot if you are disorganized, or organizing short meetings if you have a short attention span.
    3. Use one of your strengths to overwhelm your weakness
    4. Find a partner – Find someone with complementary themes of talent. For example, an entrepreneur with no knack for numbers might team up with a skilled accountant to fill that weakness. Requires a person to be able to *admit* a weakness in themselves.
    5. Just stop doing it – Last resort strategy, but effective if needed. If you stop doing something you're not good at it's possible nobody will notice or care. It's possible you earn more respect. And it's possible you'll feel better about yourself. For example, one manager who lacked the talent of empathy finally told her employees that she lacked this talent and was failing at trying to fake it. So she told her employees this and asked that they just tell her how they feel if they wanted her to know. Her employees felt like she became more "authentic", even if flawed, and more trustworthy.

- Themes have little to say about what field you should be in, and only offer some directional guidance on what role you should play within your chosen field.

- To excel as a manager and to be able to turn your employee's talents into productive strengths, you will need to use *Individualization.* This means you may set slightly different expectations for each person and your moves as a manager will need to be tailored to each individual employee.
    1. Basically you will need to recognize, and then learn to capitalize on, each person's unique strengths. This will keep your employees productive, energized, and satisfied.

Special thanks to **Mr. Bob Andros** for this summary.

Read more of Mr. Andro's thoughts on his blog at: **http://onbobsmind.com**

Appendix A:

Summary of the 34 "Themes" by Bob Andros (adapted from Gallup's descriptions)

Note: In the back of the Gallup books or upon completing the StrengthsFinder online assessment, you'll be able to view detailed descriptions of your talent themes from Gallup. (View a summary of the themes at www.strengthstest.com)

- **Achiever** – driven; constant need for achievement;
- **Activator** – Impatient for action; "When can we start?"; Must act as soon as decisions are made.
- **Adaptability** – Live in the moment; expect and respond well to new demands; flexible
- **Analytical** – "Prove it"; Insist on sound ideas; objective; Like data and patterns;
- **Arranger** – Like to be a "conductor"; enjoy managing variables and realigning them to find the perfect configuration; can change mind at last minute if new idea comes up
- **Belief** – Enduring core values; Often family-oriented, spiritual, value high ethics; Success more important than money and prestige
- **Command** – Take charge; easy to impose views on others; Fine with confrontation; Like things to be clear and up-front; May be labeled as intimidating or opinionated
- **Communication** – Like to explain, describe, host, speak in public and write; Take dry ideas and give them life; use examples, stories, metaphors; People like to listen to you
- **Competition** – Always comparing your performance to others; Like to win; May avoid contests where winning is unlikely
- **Connectedness** – Believe things happen for a reason; Believe everything is connected in some larger sense; Considerate, caring and sensitive; Faith in something greater
- **Context** – look at past to understand present; Like to understand backgrounds on people and ideas
- **Deliberative** – Careful; vigilant; private; Identify risks and mitigate them; Not effusive with praise
- **Developer** – See potential in others; Like to see people develop and grow;
- **Discipline** – Want things to be predictable, ordered, planned; You impose structure in your life by setting up routines and working on timelines; Detail oriented;
- **Empathy** – Sense emotions of others; feel what they feel; anticipate others needs; Good at expressing feelings
- **Fairness** – Balance is important; treat people the same, regardless of their situation; Don't believe others should have an advantage because of their connections or background
- **Focus** – Need a clear destination; goal driven; stay on task; impatient with delays or tangents;
- **Futuristic** – "Wouldn't it be great if...?"; Dreamer; Energized by what the future may hold; People may look to you for hope
- **Harmony** – Look for areas of agreement; dislike conflict and friction; Peacememaker; Believe productivity is enhanced by looking for common ground rather than forcing views on others
- **Ideation** – Fascinated by ideas; like finding connections between seemingly disparate phenomena
- **Inclusiveness** – Like to include people and make them feel a part of the group; Not prejudiced; No one should be ignored
- **Individualization** – Don't like generalizations about people since everyone is different; Recognize people's unique qualities and strengths; Good at building teams
- **Input** – Inquisitive; like to collect things; Find many things interesting;

- **Intellection** – Like to think; like mental exercise; Introspective; may spend time alone thinking of questions and coming up with possible answers
- **Learner** – Love to learn as well as the process of learning; Energized by journey from ignorance to competence; Might take classes such as yoga or piano;
- **Maximizer** – Like to take something good and make it great. Don't like taking something bad and making it good; fascinated by strengths – your own and others; Focus on strengths
- **Positivity** – Generous with praise, quick to smile; always looking for the positive; Might be viewed as lighthearted; Full of energy and optimism
- **Relator** – Like to spend time with people you know; Selective with relationships since you would rather deepen your existing relationships than create superficial new ones
- **Responsibility** – Feel emotionally bound to complete commitments, or will try to make it up to someone if you don't complete it; Excuses and rationalizations are unacceptable; Looked at as completely dependable;
- **Restorative** – Love to solve problems; Enjoy the challenge of analyzing symptoms, identifying what is wrong, and finding a solution
- **Self-Assurance** – You have faith in your strengths; Confidence in your abilities and judgment; Always seem to know the right decisions; not easily swayed by other's opinions
- **Significance** – Want to be viewed as significant in the eyes of others; like recognition; Want to be heard and stand out; Independent; Like to do things your way;
- **Strategic** – Able to sort through clutter to find best route; See patterns; Ask "What if"; able to foresee potential obstacles in advance and select the right path;
- **Woo** – Stands for "Winning Others Over"; Enjoy challenge of meeting people and getting them to like you; Drawn to strangers; Make connections, then move on to meet new people

Official Clifton StrengthsFinder™ Themes and Descriptions

The Clifton StrengthsFinder measures the presence of 34 talent themes. Talents are people's naturally recurring patterns of thought, feeling, or behavior that can be productively applied. The more dominant a theme is in a person, the greater the theme's impact on that person's behavior and performance.

Achiever®	People strong in the Achiever theme have a great deal of stamina and work hard. They take great satisfaction from being busy and productive.
Activator®	People strong in the Activator theme can make things happen by turning thoughts into action. They are often impatient.
Adaptability®	People strong in the Adaptability theme prefer to "go with the flow." They tend to be "now" people who take things as they come and discover the future one day at a time.
Analytical®	People strong in the Analytical theme search for reasons and causes. They have the ability to think about all the factors that might affect a situation.
Arranger™	People strong in the Arranger theme can organize, but they also have a flexibility that complements this ability. They like to figure out how all of the pieces and resources can be arranged for maximum productivity.
Belief®	People strong in the Belief theme have certain core values that are unchanging. Out of these values emerges a defined purpose for their life.
Command®	People strong in the Command theme have presence. They can take control of a situation and make decisions.
Communication®	People strong in the Communication theme generally find it easy to put their thoughts into words. They are good conversationalists and presenters.
Competition®	People strong in the Competition theme measure their progress against the performance of others. They strive to win first place and revel in contests.
Connectedness®	People strong in the Connectedness theme have faith in the links between all things. They believe there are few coincidences and that almost every event has a reason.
Consistency®	People strong in the Fairness theme are keenly aware of the need to treat people the same. They try to treat everyone in the world fairly by setting up clear rules and adhering to them.
Context®	People strong in the Context theme enjoy thinking about the past. They understand the present by researching its history.
Deliberative®	People strong in the Deliberative theme are best described by the serious care they take in making decisions or choices. They anticipate the obstacles.
Developer®	People strong in the Developer theme recognize and cultivate the potential in others. They spot the signs of each small improvement and derive satisfaction from these improvements.

Discipline™	People strong in the Discipline theme enjoy routine and structure. Their world is best described by the order they create.
Fairness ™ / Empathy™	People strong in the Empathy theme can sense the feelings of other people by imagining themselves in others' lives or others' situations.
Focus™	People strong in the Focus theme can take a direction, follow through, and make the corrections necessary to stay on track. They prioritize, then act.
Futuristic®	People strong in the Futuristic theme are inspired by the future and what could be. They inspire others with their visions of the future.
Harmony®	People strong in the Harmony theme look for consensus. They don't enjoy conflict; rather, they seek areas of agreement.
Ideation®	People strong in the Ideation theme are fascinated by ideas. They are able to find connections between seemingly disparate phenomena.
Inclusiveness® / Includer®	People strong in the Inclusiveness theme are accepting of others. They show awareness of those who feel left out, and make an effort to include them.
Individualization®	People strong in the Individualization theme are intrigued with the unique qualities of each person. They have a gift for figuring out how people who are different can work together productively.
Input®	People strong in the Input theme have a craving to know more. Often they like to collect and archive all kinds of information.
Intellection®	People strong in the Intellection theme are characterized by their intellectual activity. They are introspective and appreciate intellectual discussions.
Learner®	People strong in the Learner theme have a great desire to learn and want to continuously improve. In particular, the process of learning, rather than the outcome, excites them.
Maximizer®	People strong in the Maximizer theme focus on strengths as a way to stimulate personal and group excellence. They seek to transform something strong into something superb.
Positivity®	People strong in the Positivity theme have an enthusiasm that is contagious. They are upbeat and can get others excited about what they are going to do.
Relator®	People who are strong in the Relator theme enjoy close relationships with others. They find deep satisfaction in working hard with friends to achieve a goal.
Responsibility®	People strong in the Responsibility theme take psychological ownership of what they say they will do. They are committed to stable values such as honesty and loyalty.
Restorative®	People strong in the Restorative theme are adept at dealing with problems. They are good at figuring out what is wrong and resolving it.
Self-Assurance®	People strong in the Self-assurance theme feel confident in their ability to manage their own lives. They possess an inner compass that gives them confidence that their decisions are right.

Significance®	People strong in the Significance theme want to be very important in the eyes of others. They are independent and want to be recognized.
Strategic™	People strong in the Strategic theme create alternative ways to proceed. Faced with any given scenario, they can quickly spot the relevant patterns and issues.
Woo®	People strong in the Woo theme love the challenge of meeting new people and winning them over. They derive satisfaction from breaking the ice and making a connection with another person.

Useful Links:

- www.strengthstest.com
- www.gallup.com
- www.strengthsfinder.com
- www.thefitfactors.com